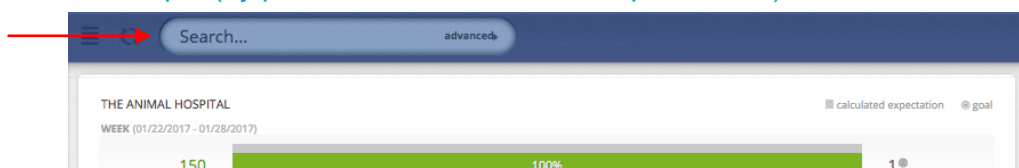


Petly Plans: How to Enroll a Pet in a Plan

Use this step-by-step guide to help you enroll pets into Petly* Plans preventive care plans. Once you're logged into the Petly Plans software, follow these easy steps to ensure every pet is getting the very best care.

1. Search for the pet (by pet name *or* owner name *or* patient ID#).

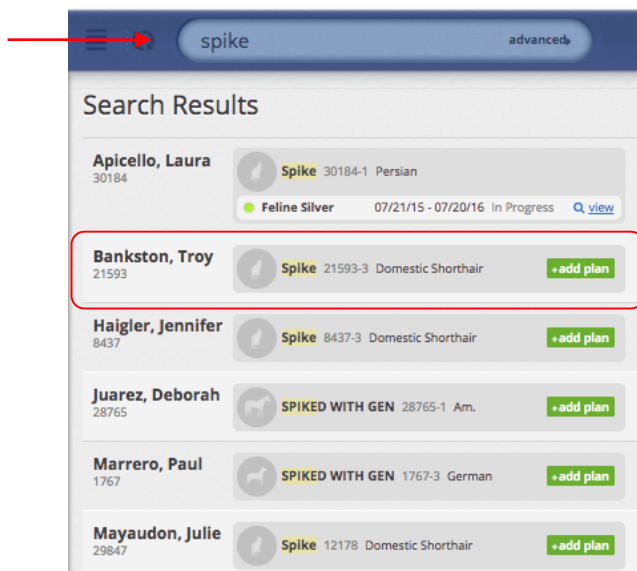


Example: Spike *or* Troy Bankston *or* 21593-3

2. Select the correct pet/owner combination.

In this window, you can see the pet species and breed, plan status, and owner's name.

- a. Click +Add plan.



A green dot under the pet's name indicates the pet is enrolled in a plan.

A red dot under the pet's name indicates a canceled plan or on-hold status (not eligible to use plan services).

3. Review and select the best plan.

- To view items in each plan, click Base Items; a high-level list of each plan expands for easy comparison.

KITTEN SILVER	KITTEN GOLD	KITTEN PLATINUM	FELINE SILVER	FELINE GOLD	FELINE PLATINUM
Initial Fee \$99.95 one time	Initial Fee \$99.95 one time	Initial Fee \$99.95 one time	Initial Fee \$99.95 one time	Initial Fee \$99.95 one time	Initial Fee \$99.95 one time
Monthly Payment \$29.99 / month	Monthly Payment \$39.95 / month	Monthly Payment \$49.95 / month	Monthly Payment \$36.99 / month	Monthly Payment \$39.95 / month	Monthly Payment \$49.95 / month
Discount \$.00 %	Discount 10.00 %	Discount 10.00 %	Discount \$.00 %	Discount 10.00 %	Discount 10.00 %
<input type="checkbox"/> Basic Dental	<input type="checkbox"/> Basic Dental	<input type="checkbox"/> Basic Dental	<input type="checkbox"/> Basic Dental	<input type="checkbox"/> Basic Dental	<input type="checkbox"/> Basic Dental
WP102: WP Annual Examination: x1 WP110: WP Examination (Co-Pay): Unlimited WP120: WP Technician Office Call: Unlimited WP215: WP Feline Vaccine (Catix) x2 WP242: WP Rabies Puravex x1 WP243: WP Fel Leukemia Vaccine (Optivar) x2 WP242: WP Rabies Puravex x1 WP243: WP Fel Leukemia Vaccine (Optivar) x2 WP271: WP Intestinal Parasite Screen (Puppy/Kitten) x1-2 WP272: WP Intestinal Parasite Screen (Puppy/Kitten) x2 WP401: WP Deworm (Puppy/Kitten) x2 WP770: WP Nail Trim Unlimited	WP102: WP Annual Examination: x1 WP110: WP Examination (Co-Pay): Unlimited WP120: WP Technician Office Call: Unlimited WP215: WP Feline Vaccine (Catix) x2 WP242: WP Rabies Puravex x1 WP243: WP Fel Leukemia Vaccine (Optivar) x2 WP271: WP Intestinal Parasite Screen (Puppy/Kitten) x1-2 WP272: WP Intestinal Parasite Screen (Puppy/Kitten) x2 WP401: WP Deworm (Puppy/Kitten) x2 WP770: WP Nail Trim Unlimited	WP102: WP Annual Examination: x1 WP110: WP Examination (Co-Pay): Unlimited WP120: WP Technician Office Call: Unlimited WP215: WP Feline Vaccine (Catix) x2 WP242: WP Rabies Puravex x1 WP243: WP Fel Leukemia Vaccine (Optivar) x2 WP271: WP Intestinal Parasite Screen (Puppy/Kitten) x1-2 WP272: WP Intestinal Parasite Screen (Puppy/Kitten) x2 WP401: WP Deworm (Puppy/Kitten) x2 WP770: WP Nail Trim Unlimited	WP102: WP Annual Examination: x1 WP110: WP Examination (Co-Pay): Unlimited WP120: WP Technician Office Call: Unlimited WP215: WP Feline Vaccine (Catix) x2 WP242: WP Rabies Puravex x1 WP243: WP Fel Leukemia Vaccine (Optivar) x2 WP271: WP Intestinal Parasite Screen (Puppy/Kitten) x1-2 WP272: WP Intestinal Parasite Screen (Puppy/Kitten) x2 WP401: WP Deworm (Puppy/Kitten) x2 WP770: WP Nail Trim Unlimited	WP102: WP Annual Examination: x1 WP110: WP Examination (Co-Pay): Unlimited WP120: WP Technician Office Call: Unlimited WP215: WP Feline Vaccine (Catix) x2 WP242: WP Rabies Puravex x1 WP243: WP Fel Leukemia Vaccine (Optivar) x2 WP271: WP Intestinal Parasite Screen (Puppy/Kitten) x1-2 WP272: WP Intestinal Parasite Screen (Puppy/Kitten) x2 WP401: WP Deworm (Puppy/Kitten) x2 WP770: WP Nail Trim Unlimited	WP102: WP Annual Examination: x1 WP110: WP Examination (Co-Pay): Unlimited WP120: WP Technician Office Call: Unlimited WP215: WP Feline Vaccine (Catix) x2 WP242: WP Rabies Puravex x1 WP243: WP Fel Leukemia Vaccine (Optivar) x2 WP271: WP Intestinal Parasite Screen (Puppy/Kitten) x1-2 WP272: WP Intestinal Parasite Screen (Puppy/Kitten) x2 WP401: WP Deworm (Puppy/Kitten) x2 WP770: WP Nail Trim Unlimited
Choose Kitten Silver	Choose Kitten Gold	Choose Kitten Platinum	Choose Feline Silver	Choose Feline Gold	Choose Feline Platinum

- b. Review the items in each plan, and then choose the one that most closely meets the pet's needs.

Tip: In the next step, you can add services to the plan.

- c. Click the green button for the plan you want.

4. Customize the plan for the pet's individual needs.


- a. Click +Add to include an additional service, and then adjust the item quantity as needed.

Choose items based on the best medical interest of the animal. Selected items are added to the Added Items section, and the cost is calculated into the fees above the plan overview.

- b. Add any additional services the pet requires.

Tip: If you need to remove a service, click x Remove.

Client: **Tray Bankston**



Plan

Kitten Gold

Initial Fee

\$39.95

one time

Monthly Fee

\$39.95

per month

+

\$3.25

per month

=

Total

\$43.10

per month

Due Today

\$143.15

Cancel & Return to Dashboard

ADD ADDITIONAL ITEMS

Item ID	Description	Price	Qty	Total
WP100	WP Annual Examination	\$200.00	1	\$200.00
WP110	WP Examination (Co-Play)	\$0.00	Unlimited	\$0.00
WP115	WP Examination Pre-Anesthetic	\$0.00	1	\$0.00
WP120	WP Technician Office Call	\$17.00	Unlimited	\$17.00
WP142	WP Rabies Puncture	\$34.00	1	\$34.00
WP181	WP FURCO Kitten	\$23.00	3	\$69.00
WP171	WP Fel Leukemia Vaccine (Kitten)	\$27.00	2	\$54.00
WP111	WP Intestinal Paras (Puppy/Kitten)	\$25.00	2	\$50.00
WP130	WP FcV/FVRV Test	\$55.00	1	\$55.00
WP401	WP Deworm (Puppy/Kitten)	\$13.00	2	\$26.00
WP353	WP Pre-Surgical Bloodwork (SAB00)	\$89.00	1	\$89.00
WP390	WP Anesthesia Monitor Set Up	\$83.00	1	\$83.00
WP710	WP Nail Trim	\$12.00	Unlimited	\$12.00
WP801	WP Microchip Implant (R11 Pet Chip)	\$42.00	1	\$42.00

ADD ITEMS

Item ID	Description	Price	Qty	Total
WP6110	WP Pain Mgmt Post OP (0-40 lbs) [Post Op Pain Meds]	\$39.00	Remove <input type="text" value="1"/>	\$39.00

AVAILABLE ITEMS

Item ID	Description	Price	Qty	Total
WP720	optional included YES sync group7b	\$30.00	+ Add	\$30.00
WP9050	WP Adz-Mals HN Fel 5-lb (Orange) 6 PK	\$99.99	+ Add	\$99.99
WP9051	WP Adz-Mals HN Fel 9-18lb (Purple) 6 PK	\$115.99	+ Add	\$115.99
WP9087	WP Revolution Fel Blue (S-154) 6 PK	\$119.99	+ Add	\$119.99

5. Review the plan fees with the pet owner.

- a. Review the fees located in the header ribbon at the top of the page.

Initial Fee \$99.95 one time	Monthly Fee \$39.95 per month	+ Added Items \$3.25 per month	= Total \$43.20 per month	Due Today \$143.15
---	--	---	--	------------------------------

Example:

- Initial fee for this practice: \$99.95. This is a one-time enrollment (or membership) fee to participate in the program.
- Monthly fee for this plan: \$39.95. This is the annual cost of all the services included in this plan divided by 12 (months).
- Added items: \$3.25. This is the monthly cost of any additional services included, beyond the base plan.
- Due today: \$143.15. This is the initial fee, plus the monthly fee, plus and the cost for added services.

All subsequent months will cost the pet owner only the monthly fee and the added services (\$43.20).

Tip: During the Review and Complete step below, the Payment Information section outlines each payment and processing date.

- b. Once you have reviewed and completed the plan, click Options.

AVAILABLE ITEMS				
Item ID	Description	Price	Qty	Total
WP540	WP Herma Repair WP Spray or Neutral	\$120.00	+ Add	\$120.00
WP610	WP Pain Mgmt Post Op (5-40 lbs) View Clip Item Menu	\$39.00	+ Add	\$39.00
WP720	optional included YES sync around 75	\$30.00	+ Add	\$30.00
<div>← BACK × CANCEL ✓ Pet ✓ Plan Items Options Payment Review OPTIONS ></div>				

6. Add options to the plan.

- a. Add any of the options below as needed; options can be selected or changed for each plan. In some cases, users with Staff access will require an administrator override to make changes during this step.

Options:

- Start date: This defaults to today's date; however, you can also backdate a plan here. Some practices offer up to 48 hours for pet owners to consider Petly Plans participation.
- Multi-pet discount: If your practice offers a discount on the initial enrollment fee for pet owners with more than one pet, you can enter it here. Enter the amount as a positive value.
- Paid in full: If a pet owner pays in full, mark it here.
- Waive initial fee: If the initial fee is being waived, mark it here.
- Notes: Enter any notes that other staff member should be made aware of.

Options

Start Date

01/27/2017

Multi Pet Discount

0.00

Paid In Full

☐

Waive Initial Fee

☐

Notes

- b. After selecting all needed options, click Payment.

Options [cancel & return to dashboard](#)

Start Date

01/27/2017

Multi Pet Discount

0.00

Paid In Full

☐

Waive Initial Fee

☐

Notes

[← BACK](#) [× CANCEL](#) [✓ Pet](#) [✓ Plan](#) [Items](#) [Options](#) [Payment](#) [Review](#) [PAYMENT >](#)

7. Add the payment method.

- a. Click +Add A New Payment Method.

- b. Complete the payment information form.

Important: We strongly recommend collecting two forms of unique payment, with the primary payment method being checking account (ACH draft).

Helpful payment information:

- ACH draft requires you to keep a copy of a voided check on file with the signed healthcare agreement.
- The AVS Mismatch box may appear if the entered address does not match the credit card or bank account address. Ask the pet owner where the card/bank statement is mailed.
- If pet owners elect to use a debit or credit card as the primary method of payment, your practice may charge a processing fee.
- Your practice settings will determine what types of credit cards are accepted
- The fields company, country, phone, fax can be left blank.

- c. When you have completed the payment section, click Review.

8. Review and complete the plan.

- Review each section with the pet owner to ensure accuracy and that the pet owner understands the plan and payment details.
- Click Complete.

Review & Complete

[cancel & return to dashboard](#)

☒ Do NOT charge today

WELLNESS PLAN INFORMATION

Plan Title	Effective Date
Kitten Gold	01/27/2017 to 01/26/2018

CLIENT INFORMATION

ID	First Name	Last Name	Home Address	Email Address
21593	Trey	Bankston	701 Rollingwood Lane, Riverview, FL 33578	n/a

PET INFORMATION

ID	Name	Microchip	Species	Sex	Birth Date
21593-3	Spike	n/a	FELINE	Spay	05/15/1998

PAYMENT INFORMATION

No payment profile has been added to this plan. There will be no charges submitted today.

The following payment(s) are a breakdown of your Wellness Plan

Due Date	Amount	Type	Status
2017-01-27	\$99.95	One Time Fee	Unpaid
2017-01-27	\$43.20	Monthly Fee	Unpaid
2017-02-20	\$43.20	Monthly Fee	Unpaid
2017-03-20	\$43.20	Monthly Fee	Unpaid
2017-04-20	\$43.20	Monthly Fee	Unpaid
2017-05-20	\$43.20	Monthly Fee	Unpaid
2017-06-20	\$43.20	Monthly Fee	Unpaid
2017-07-20	\$43.20	Monthly Fee	Unpaid
2017-08-20	\$43.20	Monthly Fee	Unpaid
2017-09-20	\$43.20	Monthly Fee	Unpaid
2017-10-20	\$43.20	Monthly Fee	Unpaid
2017-11-20	\$43.20	Monthly Fee	Unpaid
2017-12-20	\$43.20	Monthly Fee	Unpaid

BASE ITEMS

Item ID	Description	Price	Qty	Type
WP100	WP Annual Examination	\$200.00	1	\$
WP110	WP Examination (Co-Pay)	\$0.00	U	I
WP115	WP Examination Pre-Anesthetic	\$0.00	1	\$
WP120	WP Technician Office Call	\$17.00	U	\$
WP242	WP Rabies Purevax	\$34.00	1	\$
WP261	WP FVRCCP Kitten	\$23.00	3	\$
WP271	WP Fel Leukemia Vaccine (Kitten)	\$27.00	2	\$
WP311	WP Intestinal Par Scrn (Puppy/Kitten)	\$25.00	2	\$
WP320	WP FeLV/FIV Test	\$55.00	1	\$
WP401	WP Deworm (Puppy/Kitten)	\$13.00	2	\$
WP353	WP Pre-Surgical Bloodwork (SA600)	\$89.00	1	\$
WP390	WP Anesthesia Monitor/ Set Up	\$83.00	1	\$
WP710	WP Nail Trim	\$12.00	U	\$
WP801	WP Microchip Implant (911 Pet Chip)	\$42.00	1	\$

ADDED ITEMS

Item ID	Description	Price	Qty	Type
WP6110	WP Pain Mgmt Post OP (0-40 lbs) Post Op Pain Meds	\$39.00	1	\$

BACK
CANCEL

✓ Pet
✓ Plan
✓ Items
✓ Options
✓ Payment

Review

COMPLETE >

9. Print and sign the Healthcare Agreement.

- Click Print Agreement, and then print two copies of the Healthcare Agreement.

Troy Bankston Client Summary Page

Client ID: 21002264 | ID: 21593 | First: Troy | Last: Bankston | Home Address: 701 Rollingwood Lane, Riverview, FL 33578 | Email Address: n/a

Boots no active plan | **Spike** Kitten Gold

Pet ID: 21002373 | ID: 21593-3 | Name: Spike | Microchip: n/a | Species: FELINE | Sex: Spay | Birth Date: 05/15/1998 | Pet Status: Active | Member Since: 01/27/2017

KITTEN GOLD in progress | ALL OTHER PLANS

Plan ID: 208091964 | Start Date: 01/27/2017 | End Date: 01/26/2018 | Renewal Status: Automatic | Current Base Fee: \$43.20 (\$39.95 base + \$3.25 add-ons) | Usage Total: \$0.00 of \$741.00

HEALTHCARE AGREEMENT | Plan Administration

ITEMS	USAGE HISTORY	PAYMENT PROFILE	PAYMENTS	FEES	NOTES	ACTIVITY LOG
Item ID	WP Pet Item ID	Item	Description	Units	Units Remaining	Action
21000189	209650212	WP100	WP Annual Examination	1 of 1	1 of 1	select delete
21000190	209650213	WP110	WP Examination (Co-Pay)	unlimited	unlimited	select delete
21000191	209650214	WP115	WP Examination Pre-Anesthesia	1 of 1	1 of 1	select delete
21000252	209650215	WP120	WP Technician Office Call	unlimited	unlimited	select delete
21000235	209650216	WP242	WP Rabies Purevax	1 of 1	1 of 1	select delete
21000197	209650217	WP261	WP FVRCCP Kitten	\$23.00	3 of 3	select delete
21000193	209650218	WP271	WP Fel Leukemia Vaccine (Kitten)	\$27.00	2 of 2	select delete
21000209	209650219	WP311	WP Intestinal Par Scrn (Puppy/Kitten)	\$25.00	2 of 2	select delete
21000195	209650220	WP320	WP FelV/FIV Test	\$55.00	1 of 1	select delete
21000186	209650221	WP401	WP Deworm (Puppy/Kitten)	\$13.00	2 of 2	select delete
21000225	209650222	WP353	WP Pre-Surgical Bloodwork (SAB00)	\$89.00	1 of 1	select delete
21000150	209650223	WP390	WP Anesthesia Monitor/ Set Up	\$83.00	1 of 1	select delete
21000220	209650224	WP710	WP Nail Trim	\$12.00	unlimited	select delete
21000316	209650535	WP6110	WP Pain Mgmt Post OP (8-40 lbs) Post Op Pain	\$39.00	1 of 1	select delete
21000218	209650225	WP801	WP Microchip Implant (911 Pet Chip)	\$42.00	1 of 1	select delete

- Review the following with the pet owner and have the pet owner initial page 1 and sections 3 and 4 on page 2 and then sign the agreement.

Review with pet owner:

- This is not health insurance or property insurance.
 - There is a nonrefundable membership fee.
 - The plan will automatically renew each year.
 - Items in the plan are administered to the pet based on the best medical interest of the animal.
 - Draft of payment occurs on the 20th of every month.
- Review the cancellation policy with the pet owner:
 - Notice of cancellation must be provided in writing and 30 days in advance.
 - If a plan is cancelled before the end of the year, the pet owner is responsible for the full cost of any services performed, but not yet covered by the plan payments made.
 - Keep a signed copy of the healthcare agreement onsite at the practice for two years; your management team will let you know where to keep the contracts.

