

## Petly Plans: How to Enroll a Pet in a Plan

Once you're logged into the Petly Plans software, follow these easy steps to ensure every pet is getting the very best care.

- THE ANIMAL HOSPITAL

WEEK (01/22/2017 - 01/28/2017)

150 100%

calculated expectation @ goal

2. Select the correct pet/owner combination.

a. Click +Add plan.

**spike** advanced

## Search Results

**Apicello, Laura**  
30184

**Spike** 30184-1 Persian

**Feline Silver** 07/21/15 - 07/20/16 In Progress [view](#)

**Bankston, Troy**  
21593

**Spike** 21593-3 Domestic Shorthair [+ add plan](#)

**Haigler, Jennifer**  
8437

**Spike** 8437-3 Domestic Shorthair [+ add plan](#)

**Juarez, Deborah**  
28765

**SPIKED WITH GEN** 28765-1 Am. [+ add plan](#)

### 3. Review and select the best plan.

- [illegible]

- 1

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

- 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.
- Add any additional services the pet requires.

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

**BASE ITEMS**

Item ID	Description	Price	Qty	Total
WP100	WP Annual Examination	\$200.00	1	\$200.00
WP110	WP Examination (Co-Pay)	\$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
WP242	WP Rabies Purvax	\$34.00	1	\$34.00
WP261	WP FVRCP Kitten	\$23.00	3	\$69.00
WP271	WP Fel Leukemia Vaccine (Kitten)	\$27.00	2	\$54.00
WP311	WP Intestinal Par Srm (Puppy/Kitten)	\$25.00	2	\$50.00
WP320	WP FelVITV Test	\$55.00	1	\$55.00
WP401	WP Deworm (Puppy/Kitten)	\$13.00	2	\$26.00
WP553	WP Pre-Surgical Bloodwork (SAB03)	\$89.00	1	\$89.00
WP590	WP Anesthesia Monitor Set Up	\$83.00	1	\$83.00
WP710	WP Nail Trim	\$12.00	Unlimited	\$12.00
WP801	WP Microchip Implant (911 Pet Chip)	\$42.00	1	\$42.00

**ADDED ITEMS**

Item ID	Description	Price	Qty	Total
WP6110	WP Pain Mgmt Post OP (D-40) 1hr	\$39.99	1	\$39.99

**AVAILABLE ITEMS**

Item ID	Description	Price	Qty	Total
WP720	optional included YES sync group/7h	\$30.00	+ Add	\$30.00
WP650	WP Adv Multi HW Fel 5-9h (Orange) 6 PK	\$99.99	+ Add	\$99.99
WP651	WP Adv Multi HW Fel 9-18h (Purple) 6 PK	\$115.99	+ Add	\$115.99
WP687	WP Revolution Fel Blue (5-15h) 6 PK	\$119.99	+ Add	\$119.99

#### 5. Review the plan fees with the pet owner.

- 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

+ **\$3.25** per month

= **\$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.

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

**AVAILABLE ITEMS**

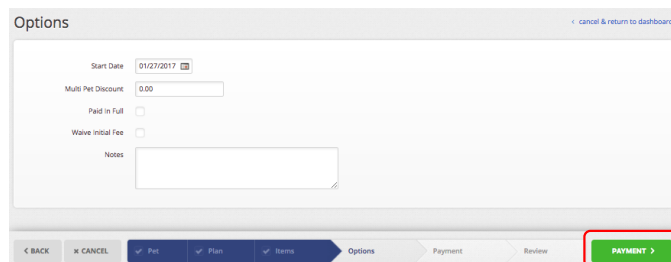
Item ID	Description	Price	Qty	Total
WP540	WP Hernia Repair W/ Spay or Neuter	\$120.00	+ Add	\$120.00
WP6110	WP Pain Mgmt Post OP (D-40) 1hr	\$39.99	+ Add	\$39.99
WP720	optional included YES sync group/7h	\$30.00	+ Add	\$30.00

Navigation: BACK CANCEL Plan Items Options Payment Review

**Options**

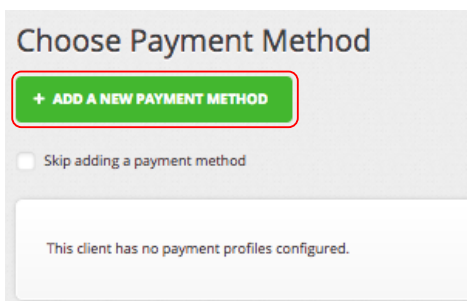
## 6. Add options to the plan.

- 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.
  - **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:** Mark if a pet owner pays in full.
  - **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.
- b. After selecting all needed options, click Payment.



## 7. Add the payment method.

- a. Click +Add A New Payment Method.

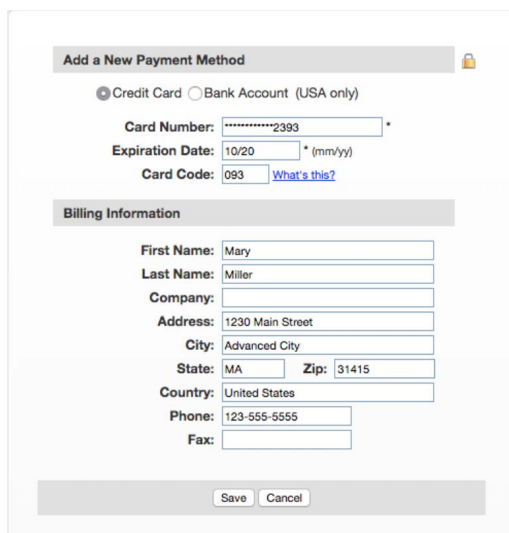


- b. Complete the payment information form.

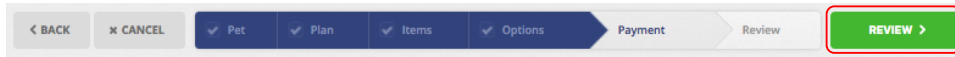
Important: We strongly recommend collecting two forms of unique payment, with the primary payment method being checking account (ACH draft).

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**

**WELLNESS PLAN INFORMATION**  
Plan Type: Canine Gold, Effective Date: 1/1/2019 to 1/1/2020

**CLIENT INFORMATION**  
First Name: Marley, Last Name: Miller, Home Address: 1234 Main Street, Ashland City, MA 01810, Email Address: mls

**PET INFORMATION**  
ID: 2725-1, Name: Marley, Microchip: n/a, Species: CANINE, Sex: Neuter, Birth Date: 05/10/2009

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

Due Date	Amount	Type	Status
2019-01-01	\$44.00	One Time Fee	Unpaid
2019-01-01	\$44.00	Monthly Fee	Unpaid
2019-02-01	\$44.00	Monthly Fee	Unpaid
2019-03-01	\$44.00	Monthly Fee	Unpaid
2019-04-01	\$44.00	Monthly Fee	Unpaid
2019-05-01	\$44.00	Monthly Fee	Unpaid
2019-06-01	\$44.00	Monthly Fee	Unpaid
2019-07-01	\$44.00	Monthly Fee	Unpaid
2019-08-01	\$44.00	Monthly Fee	Unpaid
2019-09-01	\$44.00	Monthly Fee	Unpaid
2019-10-01	\$44.00	Monthly Fee	Unpaid
2019-11-01	\$44.00	Monthly Fee	Unpaid

**BASE FEES**

Item ID	Description	Price	Qty	Total
WP100	WP Examination (Annual)	\$11.00	1	\$11.00
WP110	WP Examination (Co-Pay)	\$11.00	Unlimited	\$11.00
WP115	WP Examination Pre-Anesthetic	\$0.00	1	\$0.00
WP120	WP Technician Office Call	\$17.00	Unlimited	\$17.00
WP242	WP Rabies Vaccine ADXLT (2019-2020)	\$23.00	2	\$46.00
WP271	WP FVRCP Vaccine ADXLT (2019-2020)	\$27.00	2	\$54.00
WP271	WP FVRCP Vaccine ADXLT (2019-2020)	\$27.00	1	\$27.00
WP271	WP FVRCP Vaccine ADXLT (2019-2020)	\$27.00	1	\$27.00

Navigation: < Back, 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.

Item ID	WP Item Item ID	Item	Description	Price	Units Remaining	Action	Action
21000189	209650212	WP100	WP Annual Examination		1 of 1	<a href="#">select</a>	<a href="#">delete</a>
21000190	209650213	WP110	WP Examination (Co-Pay)		unlimited	<a href="#">select</a>	<a href="#">delete</a>
21000191	209650214	WP115	WP Examination Pre-Anesthetic		1 of 1	<a href="#">select</a>	<a href="#">delete</a>
21000252	209650215	WP120	WP Technician Office Call		unlimited	<a href="#">select</a>	<a href="#">delete</a>
21000235	209650216	WP242	WP Rabies Purevax		1 of 1	<a href="#">select</a>	<a href="#">delete</a>
21000197	209650217	WP261	WP FVRCCP Kitten	\$23.00	3 of 3	<a href="#">select</a>	<a href="#">delete</a>
21000193	209650218	WP271	WP Fel Leukemia Vaccine (Kitten)	\$27.00	2 of 2	<a href="#">select</a>	<a href="#">delete</a>

**Congratulations**

Plan has been added. No payments were charged

[PRINT AGREEMENT](#) [CLOSE](#)

- b. 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.
- 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.
- c. Review the cancellation policy with the pet owner:
- Notice of cancellation must be provided in writing 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.
- d. 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.

