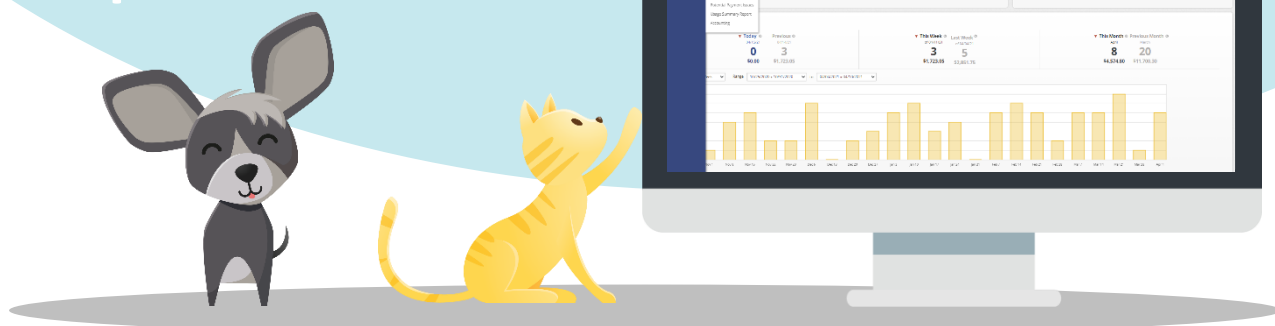


# Petly Plans: Reports Guidebook



## Why are Reports Important?

Petly Plans offers a robust selection of preset reports that are designed to help practices manage their wellness plans with ease. Running a combination of both [basic and summary reports](#) will enable you to monitor plan item usage, potential payment issues, and outstanding payments to ensure that you're successful in *collecting and tracking* all of the revenue associated with your plans.

In this section we will introduce a few key reports, along with the purpose for running them. We'll also show you where to find additional information on a complete list of reports available in Petly Plans, located on the Helpdesk.

We recommend assigning one or more dedicated staff members to run the reports outlined in this section regularly. In the beginning, it can be helpful to set calendar reminders in your practice management software to alert staff members when to run each of the reports listed below, until it becomes a habit.



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## Reports for Managing Payment-Related Issues:

### Potential Payment Issues Report

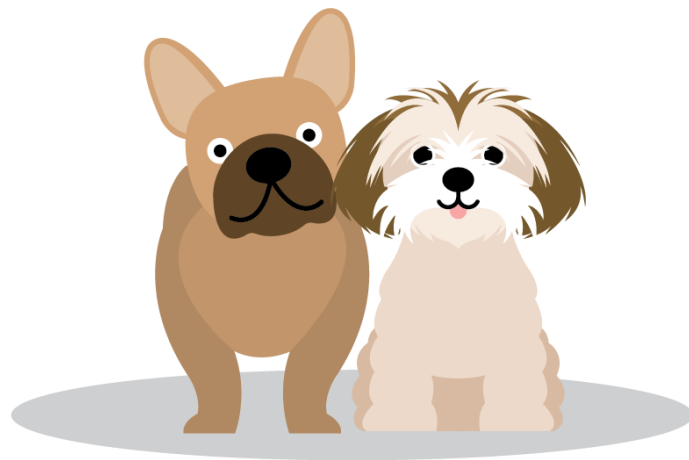
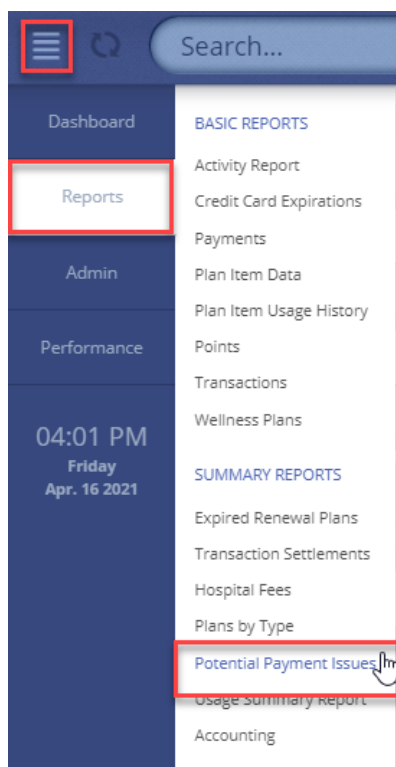
This report will display any wellness plans on a monthly payment schedule with issues that will prevent their payment from processing successfully. The reasons that plans will display on this report include the following:

- Plans with payments that have been manually marked as paid
- Plans without a payment method on file
- Plans with payments that have not been set to automatically charge
- Plans that have been placed on hold
- Plans that are suspended in change mode due to plan changes not having been completed
- Plans with expired cards on file
- Plans with a primary form of payment flagged as “Closed” or “Attention”

 **Best Practice Tip:** We recommend that you plan to run this report 3 to 5 business days prior to your auto-draft, which occurs on or around the 20<sup>th</sup>. This will give you time to reach out to the pet owner to correct the issue prior to the payment draft.

**How to Locate This Report:** *\*Only users with Admin permission level can access this report*


**Path** - [Menu](#) > [Reports Tab](#) > [Potential Payment Issues \(Summary Reports\)](#)



# Outstanding Payments Report

This report will display a list of *any* unpaid, or past due payments associated with plans. Plans listed on this report will require a follow up action. Follow up actions include:

- If payment is due, practice staff will need to contact the pet owner regarding the past due payment and obtain updated payment information, or request permission to manually re-charge the payment in Petly Plans to remove it from the report.
- If the payment was collected in the practice, the payment will need to be marked as 'paid externally' in Petly Plans to remove it from the report.
- If payment is not due and the plan has completed, the payment will need to manually be marked as 'canceled' to remove it from the report.

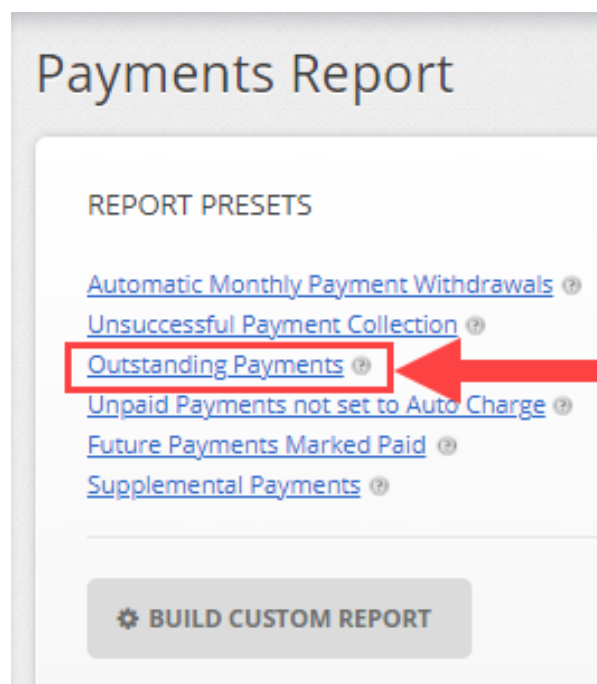
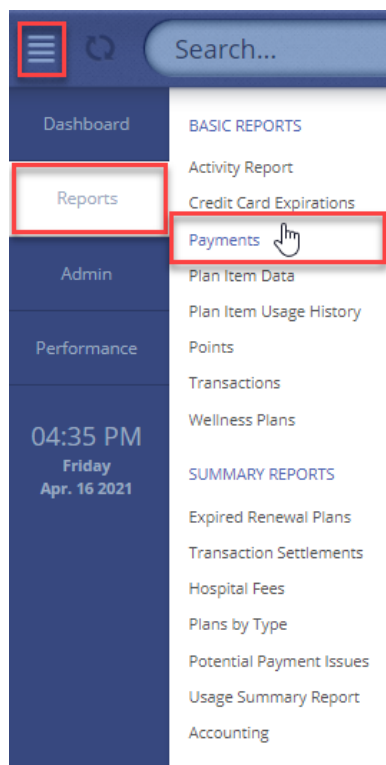
 **Best Practice Tip:** We recommend that you run this report *directly after* your auto-draft has run. This way, you can act quickly to resolve these items with your clients so that payments will draft properly in the future.

## Additional Resources:

[Declined Payments Training Video](#)

## How to Locate This Report:


**Path** - Menu > Reports Tab > Payments > Outstanding Payments (Basic Reports)



# Reports for Reconciliation

## Transaction Settlement Statement Report

This report provides a summary of settled and rejected transactions within a selected date range. The report settings automatically default to the current month. Once run, the report will display a breakdown of the different transaction types, based on the status of the transaction. You can use this report to reconcile deposits associated with wellness plans made to your practice checking account.


 **Best Practice Tip:** We recommend that you run this report at the end of every calendar month to reconcile plan revenue.

### Additional Resources:

[Transaction Settlement Statement Report](#)

## Hospital Fees Report

This report displays the IDEXX plan management fees that are charged to your practice monthly. This includes one-time fees for new plan setup, and regular monthly plan fees.

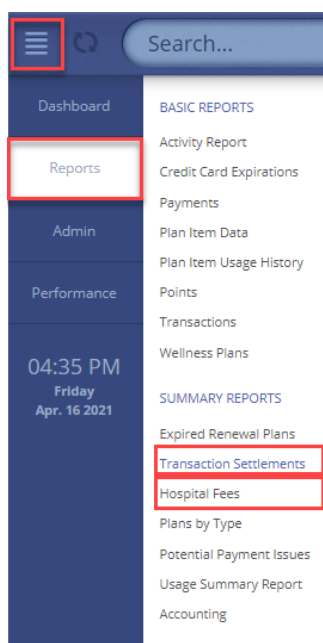
 **Best Practice Tip:** We recommend that you run this report at the end of every calendar month to reconcile IDEXX fees.

### Additional Resources:

[Hospital Fees Report](#)

**How to Locate These Reports:** *\*Only users with Admin permission level can access these reports*


**Path** - Menu > Reports Tab > Transactions Settlements/Hospital Fees (Summary Reports)



# Reports for Managing and Tracking Item Usage

## Unaddressed Item Over Usage

This report identifies plan items (by WP codes) that have been invoiced more times than what is allowed in the plan. When this occurs, it can result in a loss of revenue, due to services that were provided and not charged.

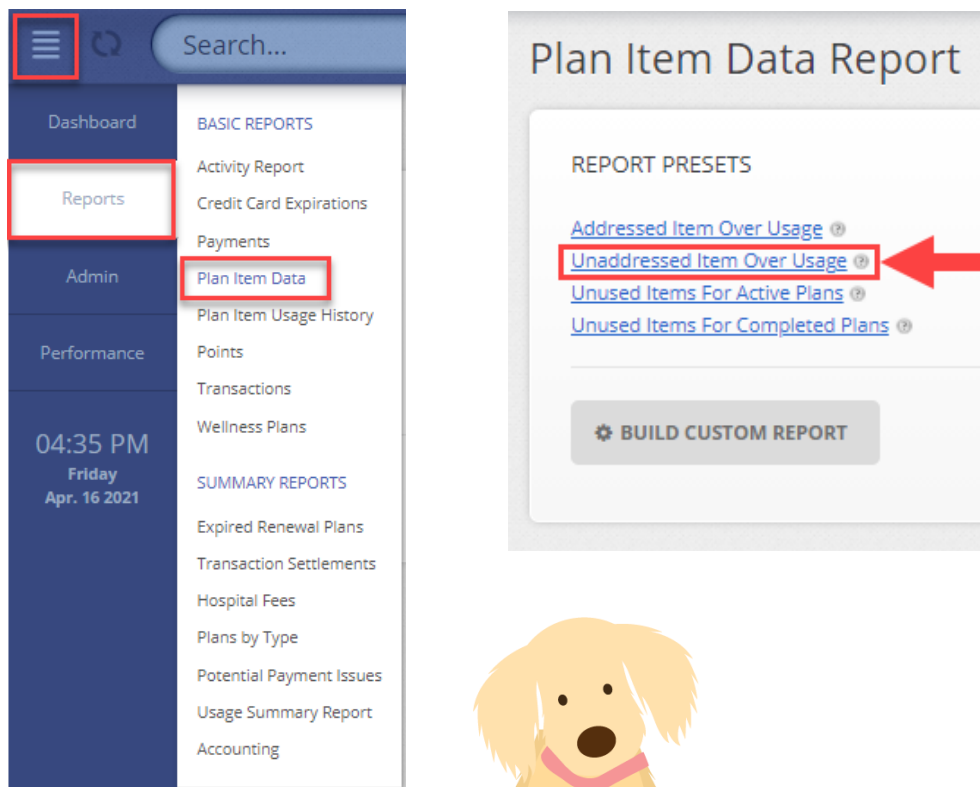
 **Best Practice Tip:** We recommend that you run this report at least once a week to catch item over-usage errors. This can also be an excellent opportunity for additional staff training. Remember to review the items listed on the patient's invoice to ensure the client was charged appropriately for services rendered.

Additional Resources:

[Unaddressed Item Over Usage](#)


### How to Locate This Report:

**Path** - Menu > Reports Tab > Plan Item Data > Unaddressed Item Over Usage (Basic)



## Unaddressed and Unmatched Item Usage

This report identifies WP items that have been used incorrectly. This occurs when items that are not included in the pet's plan type are invoiced. Unaddressed and unmatched item usage can lead to loss of revenue.

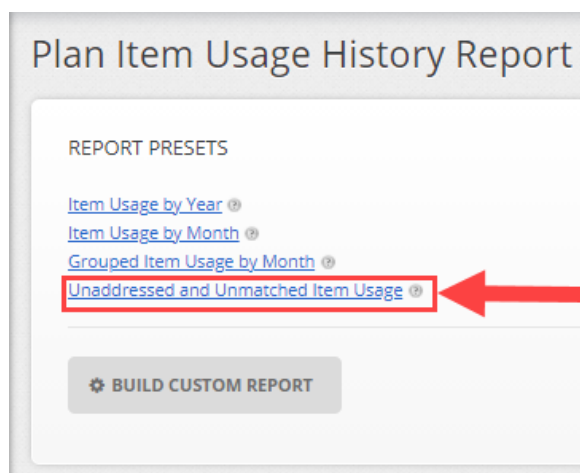
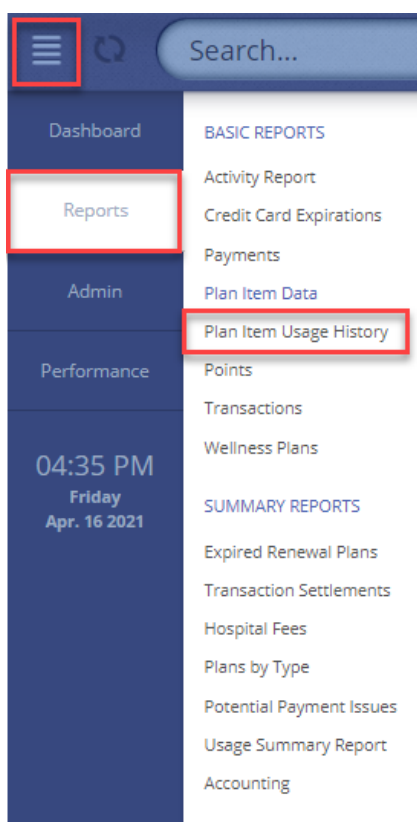
 **Best Practice Tip:** We recommend running this report at least once a week to catch item over-usage errors in a timely manner. This can be an excellent opportunity for additional staff training. Remember to view and correct any items listed on the invoice to ensure the client was charged correctly for services rendered.

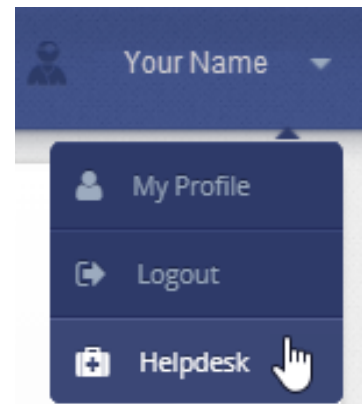
Additional Resources:

[Unaddressed and Unmatched Item Usage](#)

### How to Locate This Report:

**Path** - [Menu](#) > [Reports Tab](#) > [Plan Item Usage History](#) > [Unaddressed and Unmatched Item Usage \(Basic\)](#)





## Additional Resources

The [Petly Plans HelpDesk](#) is an excellent resource to learn more about the full suite of reports available in Petly Plans. Click your name in the upper righthand corner of your Petly Plans website and select HelpDesk to view and search assets. Use the search term [Preset Reports Summary](#) on the HelpDesk. The article will provide you with a complete list of Basic and Summary Reports, along with their uses.

Petly Plans reports can be customized and exported into .PDF and .CSV format to allow you to print copies and track your progress as needed. Please see the list of HelpDesk articles below to ensure your practice continues to accurately collect and track all revenue associated with your wellness plans!

- [Declined Payments Training Video Link](#)
- [Transaction Settlement Statement Report](#)
- [Hospital Fees Report](#)
- [Unaddressed Item Over Usage](#)
- [Unaddressed and Unmatched Item Usage](#)
- [Weekly Management of Improper Item Usage and Overdue Payments](#)

