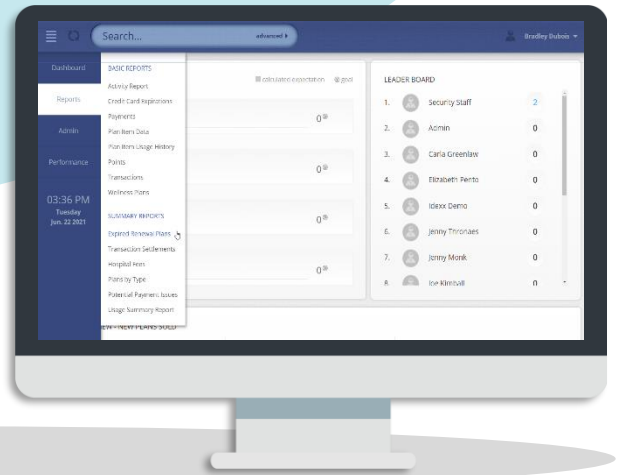
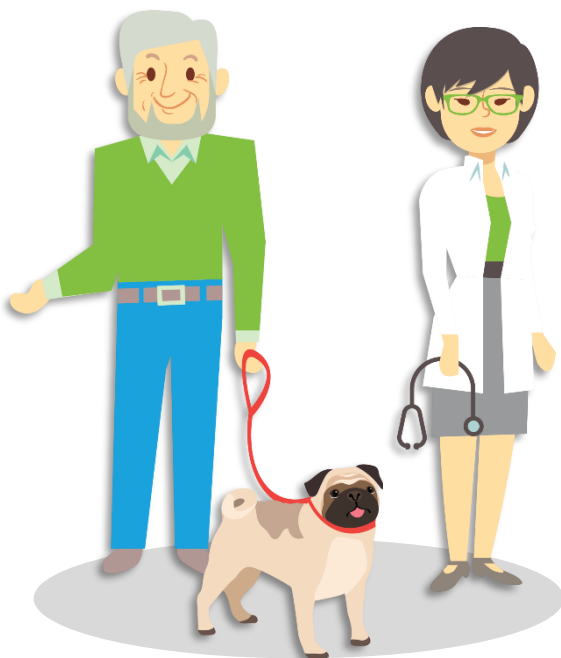


Petly Plans: Managing Renewals and Retention Guidebook



Purpose

The purpose of this guidebook is to help you understand how to effectively manage plan renewals. As plan revenue builds year-over-year, client retention is a key component of any successful wellness program. We'll introduce you to the tools available inside of Petly Plans and address the automated features of the software designed to save your staff time. We'll also take an in-depth look at renewal status by type, how plan changes impact renewals, and provide best practice recommendations along the way.



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Compliance with Local and State Governance

Depending on your local or state governance, you may be required by law to notify your pet owners prior to the automatic renewal of their wellness plans. Make sure to research the laws in your locale so your practice is prepared to comply.

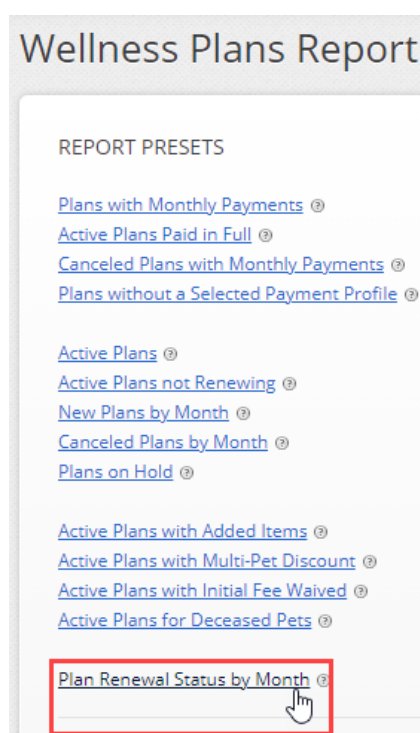
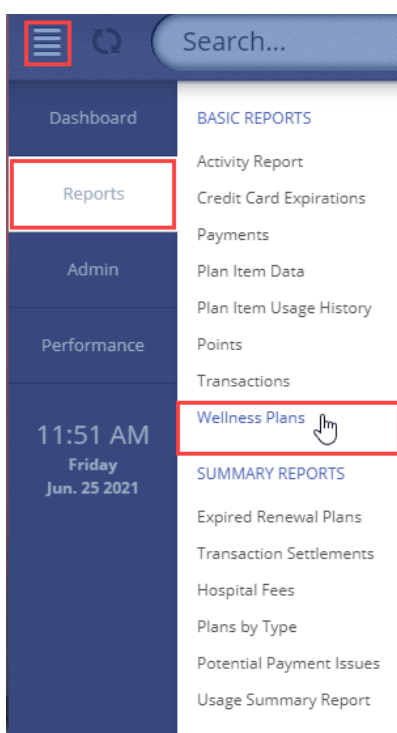
Running a Renewal Report

The first step is to run a Renewal Report in Petly Plans. This report will allow you to see all plans that are scheduled to complete within any given month, along with their renewal status. The Petly Plans software default setting for this report is set to the current month, however, this can easily be adjusted, using the drop-down feature to change the report perimeters as needed.

 **Best Practice Tip:** We recommend that you plan to run a Renewal Report at the beginning of every month, for the following 30 to 60 days out. This will position you to stay ahead of upcoming renewals and allows you ample time to contact pet owners with questions that arise, as needed.

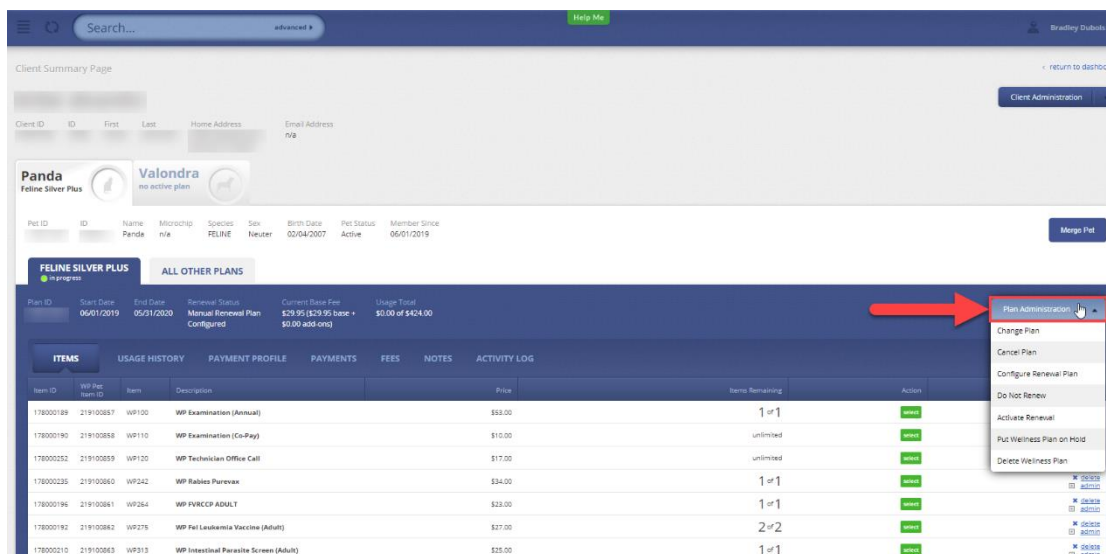
How to Locate This Report:

Path – Menu > Reports Tab > Wellness Plans > Plan Renewal Status by Month



Understanding Plan Renewal Functions

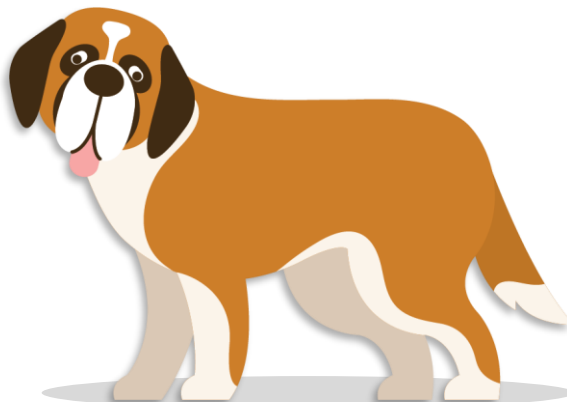
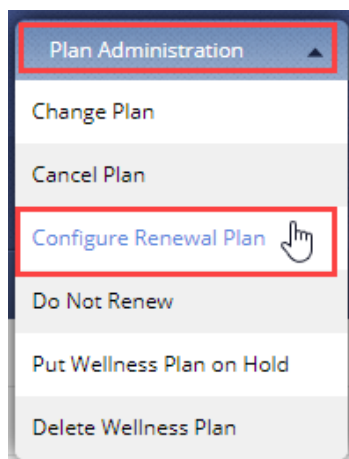
While Petly Plans defaults each new plan enrollment to automatically renew, renewal status can easily be changed based on the needs and circumstances of your pet owners. In this segment, we'll explore different renewal types, their functions, and scenarios in which these functions could apply. **Use of these functions will require Administrator or Manager level user access on the Petly Plans website. All functions can be accessed by locating the active plan and selecting the Plan Administration button on the middle right section of the screen. Speak with your manager for permission to access these functions.*



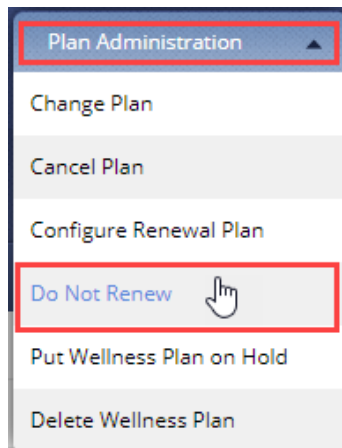
The screenshot displays the Petly Plans website interface. At the top, there is a search bar and a 'Help Me' button. Below this is the 'Client Summary Page' for a client named Panda. The page shows the client's ID, first and last name, home address, and email address. Below this, there is a section for the client's pet, Valondra, showing her ID, name, microchip number, species (FELINE), sex (Neuter), birth date (00/04/2007), pet status (Active), and member since date (06/01/2019). A 'Merge Pet' button is also visible. The main section of the page is titled 'FELINE SILVER PLUS' and shows a table of items. A red arrow points to the 'Plan Administration' button in the top right corner of the items table. A dropdown menu is open, showing options: Change Plan, Cancel Plan, Configure Renewal Plan, Do Not Renew, Activate Renewal, Put Wellness Plan on Hold, and Delete Wellness Plan.

Item ID	WP Item ID	Item	Description	Price	Items Remaining	Action
178000189	219100857	WP100	WP Examination (Annual)	\$58.00	1 of 1	View
178000190	219100858	WP110	WP Examination (Co-Pay)	\$10.00	Unlimited	View
178000252	219100859	WP120	WP Technician Office Call	\$17.00	Unlimited	View
178000235	219100860	WP242	WP Rabies Purview	\$34.00	1 of 1	View
178000196	219100861	WP264	WP PVRCP ADULT	\$28.00	1 of 1	View
178000192	219100862	WP276	WP Feline Leukemia Vaccine (Adult)	\$27.00	2 of 2	View
178000210	219100863	WP313	WP Intestinal Parasite Screen (Adult)	\$28.00	1 of 1	View

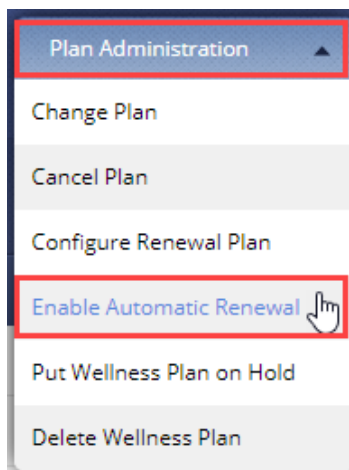
Manually Configure Renewal – The use of this function changes the plan type or optional items, upon renewal. For example, you may have an adult canine on a Gold Plan scheduled to automatically renew within 90 days. The pet owner may want to upgrade this plan to the next plan tier, Platinum, to obtain additional services. In this case, you would need to configure the renewal plan manually. Remember, all plans automatically renew into the same plan tier, except generally in the case of puppy/kitten to the lowest adult tier. You would also use this function to add or remove optional plan items to the renewal plan. For example, Fluffy is on a Canine Gold plan, which is set to automatically renew into Canine Gold. Based on the doctor's recommendation, Fluffy will need a T4 Thyroid test next year. Because the T4 is not included in the included base items for the Canine Gold, you would need to manually configure the renewal to add the T4 to Fluffy's plan for next year.



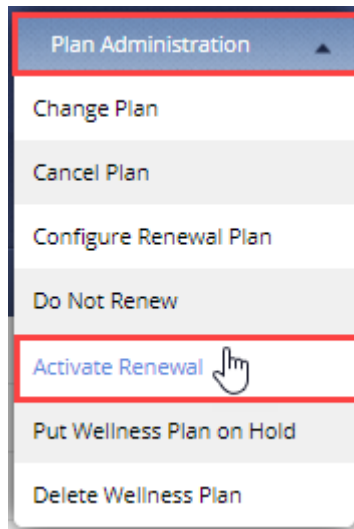
Set Plan to 'Do Not Renew' – This function is used to disable the plan from automatically renewing. For example, you may have a pet owner who is moving out of state and will no longer visit your practice. The pet owner's payments will continue to automatically draft until the plan ends.



Reenable Automatic Renewal – This function is used to turn the automatic renewal back on. This could be utilized when a plan was mistakenly disabled, or a pet owner changes their mind and wants to continue with their plan. This function must be performed prior to when the existing plan completes.



Activate Renewal Early – This function can be used if a pet needs services that have been used on the current plan that will not be available again until the plan renews. Renewing a plan early will not change the actual plan renewal date. You can only use this function within 60 days of the plan’s actual renewal date. Also – if the pet’s plan was paid in full, you will need to manually initiate the annual payment, as the plan will no longer be able to draft automatically on the actual anniversary date.



Activate Renewal

The existing plan will be marked as completed when the renewal plan is activated. The client will still be responsible for any remaining payments on the completed plan. Because this plan is paid in full, the payment for the renewal plan **MUST BE MANUALLY CHARGED**

Plan Type:	Start Date:	End Date:
Canine Comprehensive	07/08/2021	07/07/2022

✓ COMPLETE PLAN & ACTIVATE RENEWAL
✕ CANCEL

Convert Renewal Plan’s Payment Configuration – This function is used to change a plan’s payment configuration from ‘Paid in Full’ to ‘Monthly Payments’ or vice versa. This option is available beginning at 60 days prior to the renewal date and remains available until the day before the plan renews. Be sure to review the ‘All Other Plans’ tab and view the renewal plan you’d like to update. If the pet owner wants to change the payment configuration after the renewal has already processed, the plan would then have to be cancelled and a new plan set up in its place. This results in the practice being charged a new plan fee.

Search...
Need Assistance?
Bradley Dubois

Client Summary Page

Client ID:

ID:

First:

Last:

Home Address:

Email Address:

Client Administration

Timber

Canine Silver Plus

Pet ID:

ID:

Name:

Microchip:

Species:

Sex:

Birth Date:

Pet Status:

Member Since:

Merge Pet

CANINE SILVER PLUS

auto renewal

ALL OTHER PLANS

Plan ID	Start Date	End Date	Renewal Status	Current Base Fee	Usage Total
20679622	07/30/2021	07/29/2022	Automatic	\$29.95 (\$29.95 base + \$0.00 add-ons)	\$0.00 of \$441.75

ITEMS

USAGE HISTORY

PAYMENT PROFILE

PAYMENTS

FEES

NOTES

ACTIVITY LOG

Plan Administration

Delete Wellness Plan

Convert Monthly Payments to PIP Payment

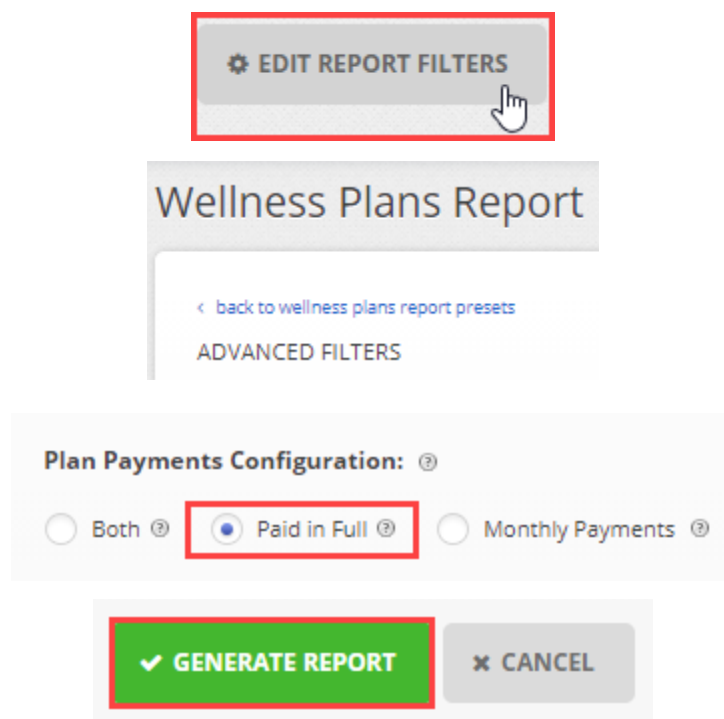
Item ID	WP Item ID	Item	Description	Price	Items Remaining	Action	Admin
1000189	223417419	WP100	WP Examination (Annual)	\$59.00	1 of 1	delete	delete
1000190	223417420	WP110	WP Examination (Co-Pay) \$10.00	\$0.00	unlimited	delete	delete

Reviewing Paid in Full Plans

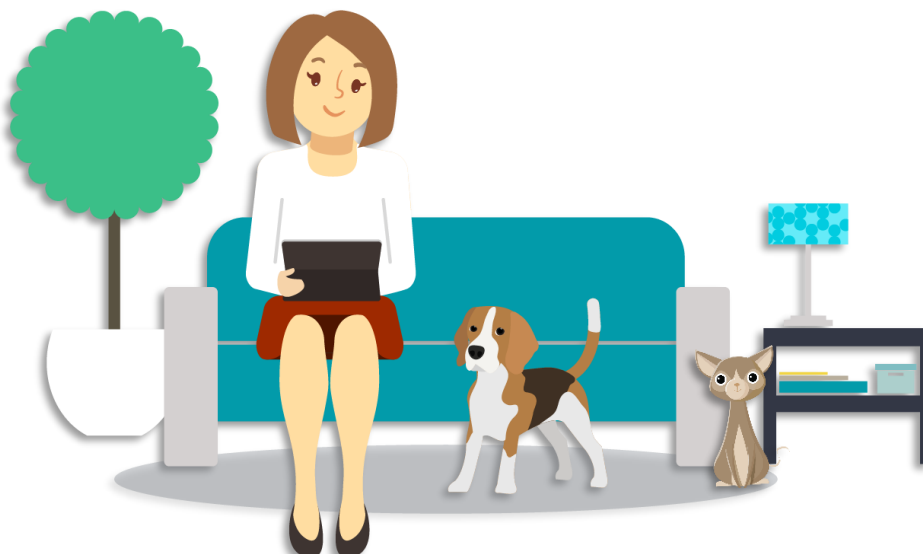
We recommend when running your renewal report, you also apply report filters so you can look at all paid in full plans and plans set to renew. This will allow you to reach out to any pet owners who have paid in full plans set to renew. You can then confirm whether they would like to continue to pay in one lump sum or convert to a monthly payment schedule.

How to Review Paid in Full Plans

Path – *Menu > Reports Tab > Wellness Plans > Plan Renewal Status by Month* – While viewing the 'Plan Renewal Status by Month' Report, click the 'Edit Report Filters' button. This will display a screen with a series of options. Check the box for 'Paid in Full' under the header, 'Plan Payments Configuration' then click the 'Generate Report' button.



The screenshot displays the 'Wellness Plans Report' interface. At the top, there is a button labeled 'EDIT REPORT FILTERS' with a gear icon. Below this is the report title 'Wellness Plans Report' and a link '< back to wellness plans report presets'. The 'ADVANCED FILTERS' section is visible, with the 'Plan Payments Configuration:' header. Under this header, three radio button options are shown: 'Both', 'Paid in Full' (which is selected and highlighted with a red box), and 'Monthly Payments'. At the bottom of the configuration section, there are two buttons: 'GENERATE REPORT' (highlighted with a green box) and 'CANCEL'.




Reviewing Plans with Add-On Items

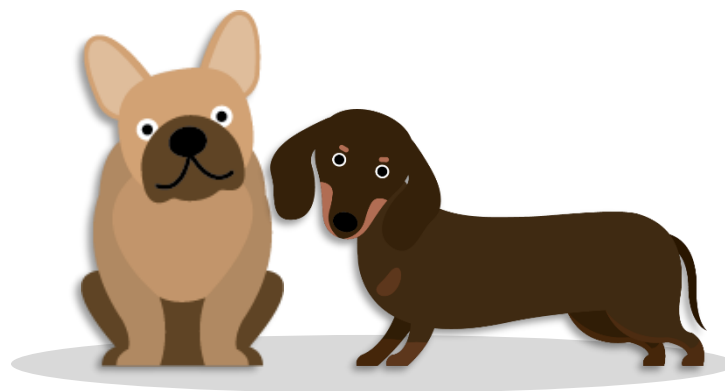
We also recommend applying report filters to review any plans that have add-on options included in them. This ensures add-on's are carried over into the plan renewal.

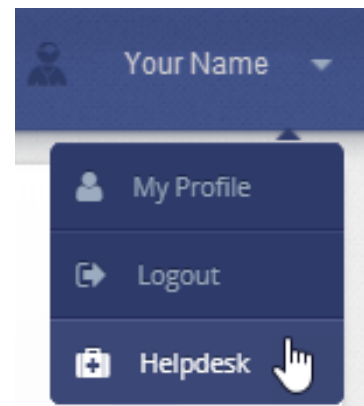
How to Review Plans with Add-On Items

Path – *Menu > Reports Tab > Wellness Plans > Plan Renewal Status by Month* – While viewing the 'Plan Renewal Status by Month' Report, click the 'Edit Report Filters' button. This will display a screen giving you a series of filter options. Check the box for 'Plans with Added Items' under the header, 'Added Items' then click the 'Generate Report' button.

The image shows two screenshots of a web application interface. The top screenshot is titled 'Wellness Plans Report' and features two buttons: '+ GENERATE NEW REPORT' and 'EDIT REPORT FILTERS'. The 'EDIT REPORT FILTERS' button is highlighted with a red rectangle and a mouse cursor. Below the buttons, it says 'PRESET: PLAN RENEWAL STATUS BY MONTH' and 'View the renewal status of plans ending in the selected month.' The bottom screenshot is also titled 'Wellness Plans Report' and shows a link '< back to wellness plans report presets' and a section labeled 'ADVANCED FILTERS'. Under 'Added Items:', there are three radio button options: 'Both', 'Plan with Added Items', and 'Plan without Added Items'. The 'Plan with Added Items' option is selected and highlighted with a red rectangle. At the bottom, there are two buttons: a green '✓ GENERATE REPORT' button and a grey '✕ CANCEL' button. The 'GENERATE REPORT' button is also highlighted with a red rectangle.

 **Best Practice Tip** - Create a reminder in your client communication software to automatically alert the pet owner their plan is renewing.





Additional Resources

The Petly Plans [Helpdesk](#) is an excellent resource for learning more about managing plan renewals. Click your name in the upper righthand corner of your Petly Plans website and select [Helpdesk](#) to view and search assets, based on topic.

- [Stop an In-Progress Plan from Auto Renewing](#)
- [Enable an Automatic Renewal](#)
- [Manually Configure the Plan for the Next Renewal Term](#)
- [Change a Pay-in-Full Payment Structure to Monthly Payments](#)
- [Start the Upcoming Renewal Plan Early](#)

