

# FAQs



Below is a list of common questions about preventive care and the Petly® Plans software.

## Preventive care



Print a [pet owner FAQ](#) and customize for your pet owners.

**Q:** What is preventive care?

**A:** Preventive care seeks to prevent illness through regular examinations, vaccinations, screenings, and other medical procedures so you have information about the pet's body, organs, and overall health. Regular, thorough examinations and measurement changes in a pet's health can help detect issue earlier, and treatment can begin sooner to avoid care becoming costlier in the future. This approach to pet healthcare is called preventive care.



**Q:** What are [Petly Plans](#) ?

**A:** Petly Plans are affordable monthly payment plans for pets' preventive care services. These plans were created by your veterinarians to help pet owners have convenient and affordable preventive care for their pets. Petly Plans allow your pet owners to make monthly payments and avoid paying for services in a lump sum.

## Enrollment requirements

**Q:** What does a pet owner need to [enroll their pet in a wellness plan](#) ?

**A:** A pet owner will need to present a driver's license and two forms of [payment](#):

-  Checking account (must provide routing number and account number)
-  Major credit or debit card

**Q:** What if the pet owner doesn't have two forms of payment?

**A:** Contact management. They may be able to authorize enrollment with only one form of payment until the pet owner can provide a second form of payment.

**Q:** What is the initial membership fee?

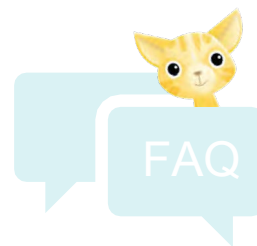
**A:** The initial membership fee is a one-time fee that is collected from the pet owner on the day of enrollment along with the first month's payment.

**Q:** How much will the pet owner be expected to pay when enrolling their pet in a plan?

**A:** They will be responsible for paying the initial membership fee and the first month's payment in order to enroll in a plan.

**Q:** Does the pet owner get a discount for enrolling multiple pets?

**A:** If your practice offers a multiple-pet discount, then input your discount during the enrollment process.



## Plan services



**Q:** Can any services performed prior to enrollment be covered now?

**A:** No, only services that were performed during today's appointment can be included as part of a plan. Services from previous appointments are not eligible.

**Q:** Can a pet owner [change their pet's plan?](#)

**A:** Yes, a plan may be upgraded if the veterinarian identifies a need for a different plan for instance, if the pet needs a dental cleaning. A plan can be downgraded only at the time of renewal.



**Q:** Do the services roll over to the next year if the pet owner does not use them within 1 year from the date of enrollment?

**A:** No, the services must be used within 1 year from the date of enrollment.

## Cancellations and discounts

**Q:** If a pet owner no longer wishes to participate in their wellness plan, can they [cancel the plan?](#)

**A:** This decision will be at the discretion of your management. Notice of cancellation must be provided in writing at least 30 days prior to the desired cancellation date. When a plan is canceled in the Petly Plans software, you will receive three cancellation options. The pet owner can either pay the remaining balance for the plan, be responsible for services rendered minus payments made to date, or cancel without any additional payments collected. The enrollment fee is nonrefundable.

**Q:** If a pet owner transfers ownership of their pet to another person, can the plan be transferred to the new owner?

**A:** No, plans are non-transferable. The plan will need to be canceled under the old owner and the new owner can enroll the pet in a new plan. Pet owners can cancel their plan by notifying the practice in writing. The enrollment fee is non-refundable.



## Invoicing

- Q:** Can we use our regular codes when invoicing a pet that is on a plan and expect Petly Plans to sync usage?
- A:** No. Wellness Plan (WP) codes have been created in your practice management software to be used only for wellness plan members when they come in for services included in their plans. Once WP codes are used on an invoice, Petly Plans will automatically sync the usage of them overnight.
- Q:** I added a new pet owner/patient in my practice management software and now I can't find them in Petly Plans to enroll. What do I do?
- A:** This means you must perform a Quick Sync in Petly Plans to sync the new pet owner or patient from your practice management software into Petly Plans. You will then be able to [search for the pet owner/patient to enroll in a plan](#).
- Q:** When does Petly Plans draft the pet owner's first automatic payment from the bank account or credit card that is on file?
- A:** The pet owner will pay the initial membership fee and first month's payment the day they enroll. Then the first automatic payment will happen on the 20th of the following month. For example: If they enroll any day in the month of June, their next payment will be due on July 20th. We will never bill a pet owner for their plan twice in 1 month.
- Q:** What do we do if a payment is declined in Petly Plans?
- A:** The hospital will be responsible for [following up with the pet owner](#) to charge another form of payment. If for some reason you are unable to collect payment, it will be up to the management to decide [how to manage the status of payments and transactions](#).

## Vaccines and emergencies



- Q:** If the patient has had vaccines waived for medical reasons, is there a plan for them, or can the available plans be modified to exclude the vaccinations?
- A:** These are package-priced plans and we are unable to remove any items from the package. If a patient has vaccinations waived, then a preventive care plan may not be well suited as there may not be sufficient value.
- Q:** Can a pet owner use any of the included services on emergency, specialty, or sick/injury visits?
- A:** These plans are designed to identify any abnormalities or changes in organ function, dental health, weight loss/gain, etc, in healthy pets to prevent disease or to detect disease in early stages to slow progression. The pet owner should consider an accident/illness insurance policy for other types of visits. Ultimately, management can make the decision whether or not to allow plan item usage outside of a preventive care appointment.

# Pet owner objections

Hearing “no” more often than “yes” when offering your plans to pet owners? The good news is that hearing “no” is normal and we have talk tracks to help you persuade the pet owner to say “yes.” When a pet owner objects to the idea of preventive care plans, it’s important to understand the hesitation. They could require additional information before becoming comfortable enrolling. Keep in mind that preventive care plans may not be intended for every pet. Here are some common objections with recommended actions.

## Changing the pet owner mindset



### **The initial membership fee is too expensive:**

Position this as a membership or loyalty program. Ensure the pet owner knows this is a one-time fee that covers membership entrance for the life of the plan and allows access to perks and discounts. Typically, the amount of savings throughout the life of the plan far exceeds the cost of the initial membership fee. Some examples are average savings per year (based on your discount on items in the plan) and discounts on non-plan items, copays, complimentary nail trims, technician visits, etc. You can say “as a member of [name of your practice], you’re eligible for our special loyalty program, if you’d like to participate.”



### **Previous negative experience when enrolled in a plan at another location:**

Ensure the pet owner understands that your plans were designed by your practice and reflect your standard of care. They are flexible and include the common preventive care blood work, diagnostics, and vaccinations required for their pet.



### **Assumption that they are unable to cancel a plan:**

Ensure the pet owner they can cancel the plan in the event of unforeseen circumstances (for instance if, they move or can no longer pay for the plan). They will be responsible for the difference between services used and payments made to date upon cancellation.



### **Uneasy that payment information isn’t stored safely:**

All Petly Plans payment profiles (including credit card and bank account numbers) are securely stored in the Authorize.Net® Customer Information Manager (CIM) as soon as they are entered into Authorize.Net® secure form embedded in Petly Plans. Authorize.Net® is a subsidiary of Visa Inc. In addition, Petly Plans operates with Secure Sockets Layer (SSL) encryption by default. Lastly, the staff only has visibility to the credit card’s last 4 digits and expiration date to validate payment method once the payment profile is entered.



### **They need to speak with their significant other before enrolling:**




Offer them a few minutes to call and discuss this with their loved one. Provide an estimate and highlight what services would be covered in the plan if they enrolled today. Also, let the pet owner know they can enroll their pet in a plan at their next appointment if their significant other is not available when they call. Follow up with the pet owner in a week or so to see if they are still interested.

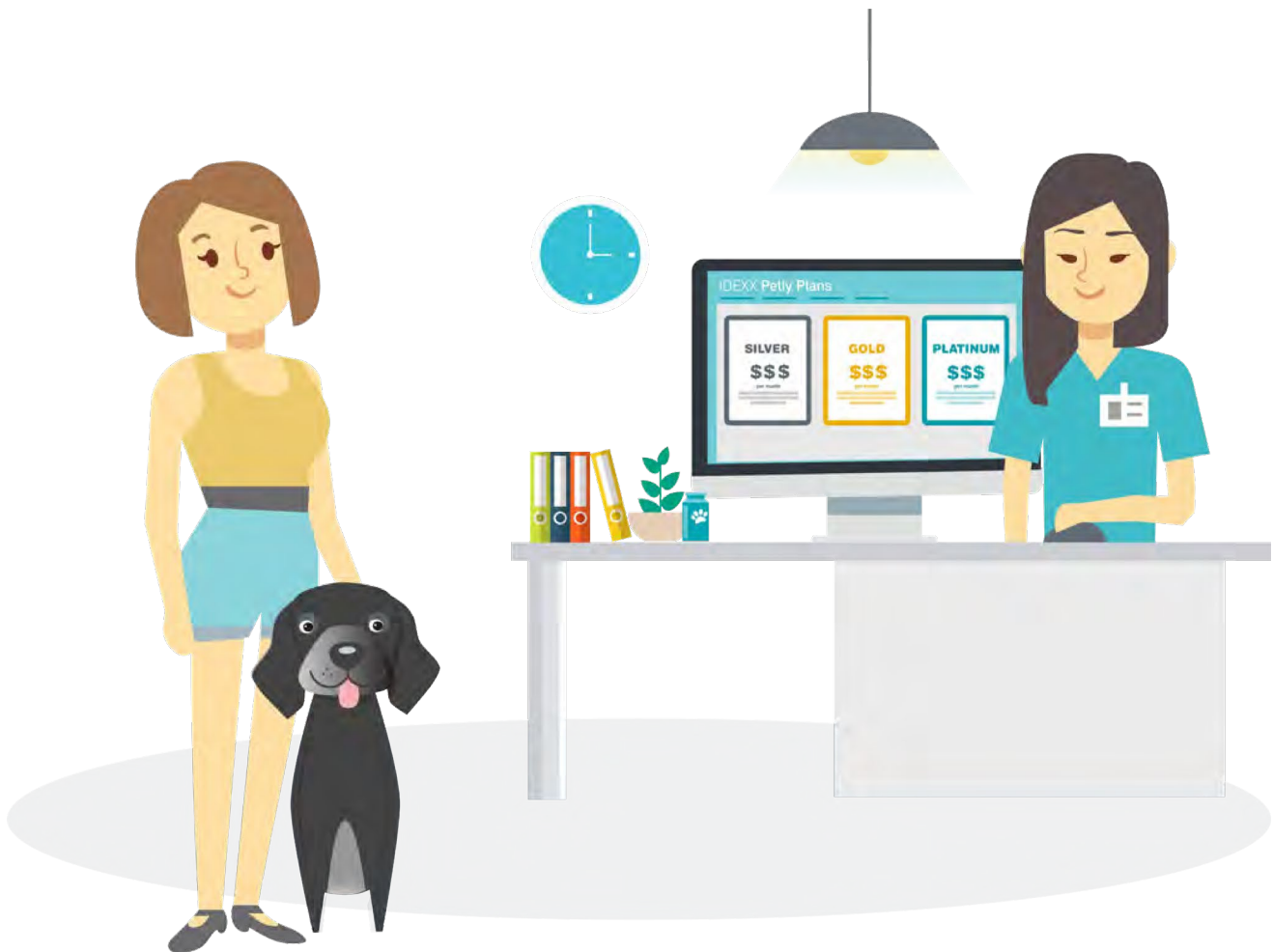


### **The pet owner confuses a preventive care plan with insurance:**

Explain that plans are designed to cover all the recommend predictable annual expenses to keep their pet healthy and spread the cost into monthly payments. The plan is not designed to cover their pet in the event of an accident or emergency like an insurance policy would.

## Indications the plan isn't the right fit:

-  **The pet owner doesn't live in the same area as your practice year-round:**  
If an owner is unable use the full benefits of the plan due to geography, a plan may not be right for them.
-  **Unable to provide the required enrollment items, complete the preapproval application, two forms of payment/ID:**  
This may be an indication that the owner isn't able to make the financial commitment for plan term. Ask a member of management how to proceed.
-  **Pet has a known health issue and a life span prognosis of less than one year:**



It's important to discreetly recognize and not recommend the plan for pets who may likely pass away before the plan term is up. If the pet owner inquires, it's best to explain they wouldn't be able to receive all benefits of the plan because of their pet's condition.