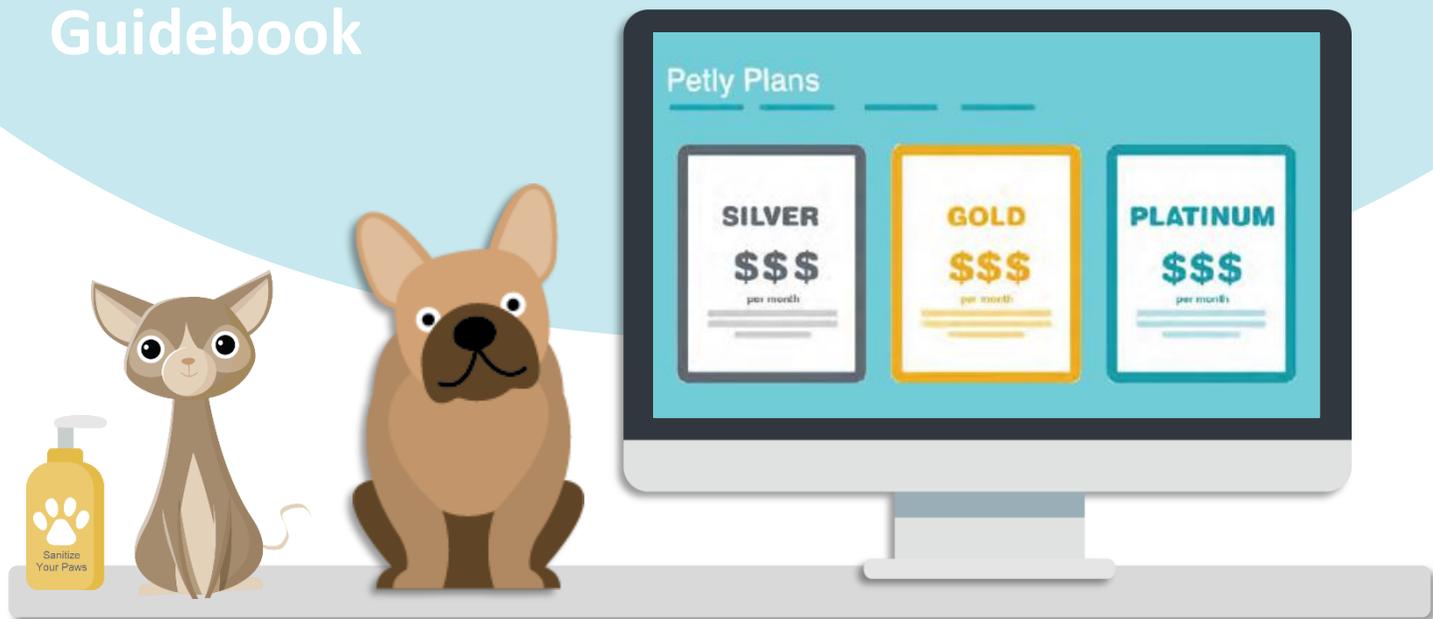
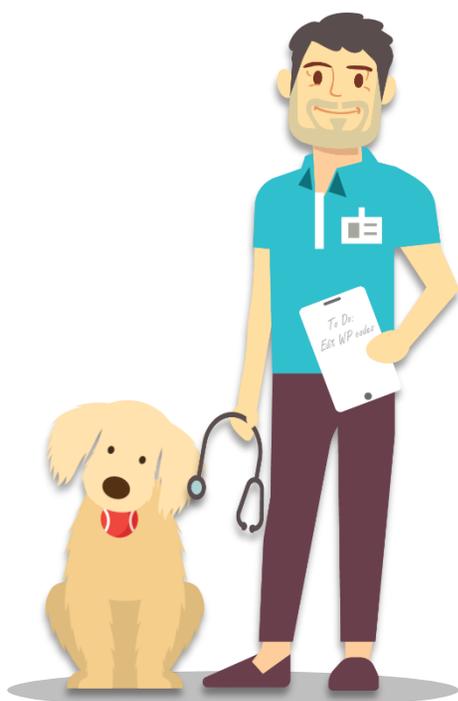


# Petly Plans: Pricing Update Guidebook



## Purpose

This guidebook outlines the steps a Petly Plans practice should follow when updating their base monthly fees. The guide links to Helpdesk articles about editing your wellness plan templates, managing renewal pricing, an example renewal letter to send to clients, as well as providing best practice tips and suggestions, and how-to explanations, with images throughout.



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## Base Monthly Fee Increase

The best practice recommendation is to increase your base monthly fees about every 2 to 3 years. Adjusting your pricing with this cadence will ensure your pet parents are accustomed to paying a consistent amount for their plans without the perception of overpaying. This will also ensure your pricing is in line with your increased operating costs.



### Determining Your Price Increases

Does your practice have a cost increase determined for each plan after carefully analyzing plan item costs? It's important to consider when you last increased prices and by what amount when determining how to proceed. Before you implement WP price changes you may want to discuss the proposed changes with a Petly Plans team member. This will help ensure you are setting fair and accurate pricing.



### Not Sure How to Establish New Base Monthly Fees?

A Petly Plans team member can conduct a plan review with you. Rate increases will be determined with the current cost of each plan item and any applicable plan discount.

## Wellness Plan Items

In this section, we will review best practices for adding or removing wellness plan items from your plans and updating WP code pricing in your Practice Information Management Software, referred to in this guidebook as PIMS, for short.



### Adding Plan Items

Updating your base monthly fees can be a great opportunity to evaluate the content of your plans! Entice pet owners to enroll and improve the health of pets by including member perks like exam co-pays, complimentary or discounted nail trims, anal gland expressions, and tech office visits. Consider offering optional add-on items like advanced diagnostics, non-core vaccines, flea, tick, and heartworm preventatives, and others. Adding items into your plans may require creating new WP codes in your PIMS to track usage of these items inside your Petly Plans software. Adding items may also require creating all new plan templates in Petly Plans to avoid item usage errors. A Petly Plans team member can review your proposed price updates with you. Additionally, [click this link](#) to review the Guidebook to Managing Your Wellness Plan Program. Here, you can visit the Plan Development section for more best practices on developing successful plans.



### Removing Plan items

Do certain wellness plan items consistently remain unused year-over-year? Consider running the *Unused Items for Completed Plans* report to isolate trends in your plan usage. To run this report, go to *Menu > Reports > Plan Item Data > Unused Items for Completed Plans*, and select a year. The results of this report can help you determine if certain items could be removed from your plans due to lack of consumption or designated as add-on items instead. [Click this link](#) to read more about running this report. Additionally, it is important to remove or inactivate any WP items from your PIMS and inside Petly Plans if your practice no longer offers them. Click the links to read about deactivating a [WP item within your PIMS](#) and [Petly Plans](#).

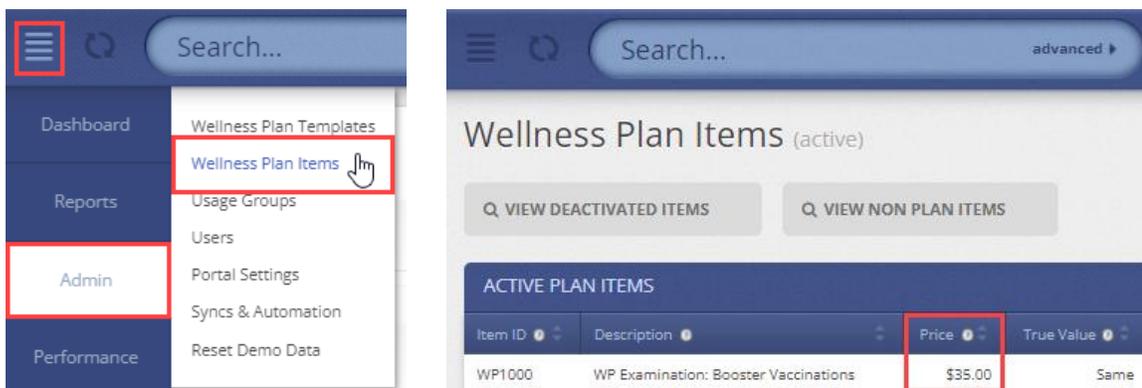


## Updating WP Code Pricing

Have your WP code prices been updated to reflect the current retail value of each item included in your plans? It's important to update WP code costs any time the prices of your regular invoice items increase, even if you are not changing your base monthly fees. Keep in mind, updating the price of a WP code inside your PIMS will **not** alter the base monthly fee pet owners pay for their plans. This fee only changes when you manually update it in the Petly Plans software. If the retail cost of an optional add-on item is changed, the add-on monthly fee will adjust within the plan at the time the plan renews or if a plan change is performed. To review which prices Petly Plans recognizes for each WP code, go to *Menu > Admin > Wellness Plan Items* and review the *Price* column.

These prices are the values Petly Plans uses to calculate the dollar value of services consumed in a plan if a pet owner cancels before the end of their plan term. Updating these prices ensures pet owners are held accountable for the current price of every plan item. WP prices in Petly Plans are determined by costs set up inside your PIMS. Any price updates inside your PIMS will automatically update in the Petly Plans software either after an automatic overnight sync, or with a manual sync. To manually sync WP prices after updating them in your PIMS, go to *Menu > Admin > Syncs & Automation > Sync Items*. We have also provided screenshots on editing the WP code pricing for Cornerstone, AVImark, and ImproMed software systems in the next section.

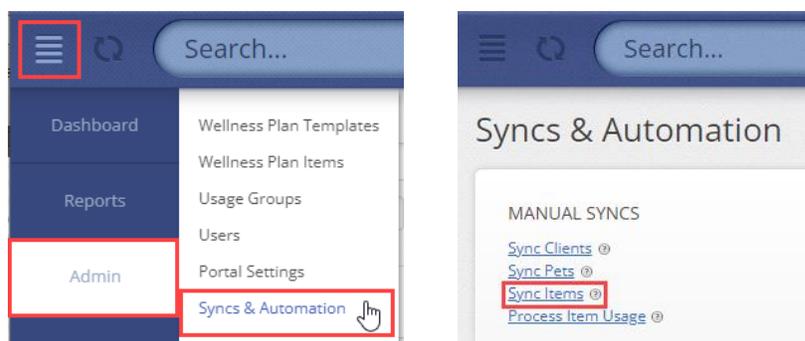
## Viewing pricing in Petly Plans



The screenshot shows the Petly Plans software interface. On the left, a navigation menu is open, with 'Admin' highlighted. The 'Wellness Plan Items' option is selected, and a hand cursor is over it. The main content area displays 'Wellness Plan Items (active)'. Below this, there are two buttons: 'VIEW DEACTIVATED ITEMS' and 'VIEW NON PLAN ITEMS'. A table titled 'ACTIVE PLAN ITEMS' is shown with the following data:

Item ID	Description	Price	True Value
WP1000	WP Examination: Booster Vaccinations	\$35.00	Same

## Manual sync to update item pricing



The screenshot shows the Petly Plans software interface. On the left, a navigation menu is open, with 'Admin' highlighted. The 'Syncs & Automation' option is selected, and a hand cursor is over it. The main content area displays 'Syncs & Automation'. Below this, there is a section titled 'MANUAL SYNCs' with the following options:

- [Sync Clients](#)
- [Sync Pets](#)
- [Sync Items](#)
- [Process Item Usage](#)

## Cornerstone

WP codes must have matching prices in both **Base** and **Minimum** fields on the *Info* tab of each WP item for Petly Plans to recognize the correct price. See below for a screenshot of the invoice item setup in Cornerstone. Note, the **Base** and **Minimum** areas outlined in red. Please ensure the current retail prices are listed here any time your prices change.

Invoice Item Information for WP Canine Rabies 1 Year

ID: WP2080 WP Canine Rabies 1 Year  Inventory  Service  Group  Pick  Dispensing

**Info** Instructions Reminders Tax/Disc Link Items Spec. Actions Travel Whiteboard

Item information  
Hospital description: WP Canine Rabies 1 Year  
Client description: Canine Rabies 1 Year

Classification  
Primary: WELLNESS PLANS  
Subclass:

Default revenue center Sell barcode

Pricing  
Minimum price: 12.00  
Dispensing fee: .00  
 Omit dispensing fee for multiple patients  
Estimate markup: .00 %

Automatic  
 Auto calculate price  
 Percentage  
 Dollar amount  
Round to: 0

Type  
Status: Active  
 Miscellaneous item  
 Controlled substance  
 Hazardous  
 MSDS  
 Display on Vaccine Tab  
Unit of measure:

Quantity	Amount	Markup
Base	12.00	.00
.00	.00	.00
.00	.00	.00
.00	.00	.00

Allow change: Always

## AVImark

Your Petly Plans website recognizes pricing from AVImark's treatment codes from the **Charge** area of each WP item's *Treatment* tab. Note this area outlined below in red. Please ensure current retail prices are listed here any time your prices change. Review the [Petly Plans Setup in AVImark Guidebook](#) for more information.

AVI Change - WP Rabies

Treatment: Advanced Contract Prices Documents Whiteboard Laboratory Associated Entries Plan Entries Re

Code WP2020 Description WP Rabies Charge 30.00

Action Codes F Report Codes List Codes Cost 30.000

Discount Class Wellness Plans Appointment Time 0 min. Markup Percent 0

Species 1 (none) Species 2 (none) Sex(es)

Photo Abbreviation

Form Invoice

Journal Doctor (none)

Change Patient Status None Category Wellness Plans

Comments Doctor's notes

ATTACHMENTS  
 Doctor's Instructions...  
 More Stuff...

Print comments on invoice

Next Prior OK Cancel

## ImproMed

Petly Plans recognizes pricing from ImproMed's **Price** fields under the **Default Low Quantity** and **Default High Quantity** sections of the **Setup Products** window. Below are two examples of ImproMed WP items, one with a **Packaging Fee**, and one without. Please ensure your current retail prices are listed appropriately any time they change.

### WP Item without a Packaging Fee

In this example, the **Unit Price** of the item is \$45.00. The retail cost is also listed under the **Default Low Quantity** and **Default High Quantity Price** fields as \$45.00. The retail price is the sum of the **Packaging Fee** and the **Unit Price**: \$0.00 + \$45.00. Listing the retail price in the two **Price** fields at the bottom will ensure Petly Plans recognizes the correct amount for your WP item.

Product Name: WP HOMEAGAIN MICROCHIP (Inv) Code: WP1500 BarCode: WP1500

General Pricing Employees Notes Images Patients Info Treatments

This product is linked to the following Inventory Item:  
Code: 2689 BarCode: 2689INV Inventory Name: HOMEAGAIN MICROCHIPPING

Quantity to remove: 1.00  
Base Cost: (for Pricing) \$ 20.9900

Minimum Price: \$ 45.00 Packaging Fee: \$ 0.00 Temporary Discount: 0 % Round final Selling Price to the following: (none) Decimals: 0

Multiply the Minimum Price by the Selling Quantity. Price remains fixed when the Unit cost changes: Yes

Selling Quantity	Invoice & Low Estimate	High Estimate		
Less than or equal to	Markup	Unit Price	Markup	Unit Price
99999	2.1439	\$ 45.00	2.1439	\$ 45.00
99999	0.0	\$ 0.00	0.0	\$ 0.00
99999	0.0	\$ 0.00	0.0	\$ 0.00
99999	0.0	\$ 0.00	0.0	\$ 0.00
99999	0.0	\$ 0.00	0.0	\$ 0.00

Default Low Quantity				Default High Quantity			
Quantity	Price	Sales Tax	Use Tax	Quantity	Price	Sales Tax	Use Tax
1	\$ 45.00	\$ 0.00	\$ 0.00	1	\$ 45.00	\$ 0.00	\$ 0.00

Show required information.

### WP Item with a Packaging Fee

In this example, the **Unit Price** of the item is \$25.11. The retail price, however, is listed under the **Default Low Quantity** and **Default High Quantity Price** fields as \$35.61. The retail price is the sum of the **Packaging Fee** and the **Unit Price**: \$10.50 + \$25.11. Listing the retail price in the two **Price** fields at the bottom will ensure Petly Plans recognizes the correct amount for your WP item.

Product Name: WP LEUKEMIA Ultra VACCINE #1 PRIMARY (Inv) Code: WP130 BarCode: WP130

General Pricing Employees Notes Images Patients Info Treatments

This product is linked to the following Inventory Item:  
Code: 211B BarCode: 211B Inventory Name: Leukemia Vaccine 2 year

Quantity to remove: 1  
Base Cost: (for Pricing) \$ 12.5546

Minimum Price: \$ 25.00 Packaging Fee: \$ 10.50 Temporary Discount: 0 % Round final Selling Price to the following: (none) Decimals: 0

Multiply the Minimum Price by the Selling Quantity. Price remains fixed when the Unit cost changes: No

Selling Quantity	Invoice & Low Estimate	High Estimate		
Less than or equal to	Markup	Unit Price	Markup	Unit Price
99999	2	\$ 25.11	2	\$ 25.11
99999	0	\$ 0.00	0	\$ 0.00
99999	0	\$ 0.00	0	\$ 0.00
99999	0	\$ 0.00	0	\$ 0.00
99999	0	\$ 0.00	0	\$ 0.00

Default Low Quantity				Default High Quantity			
Quantity	Price	Sales Tax	Use Tax	Quantity	Price	Sales Tax	Use Tax
1	\$ 35.61	\$ 0.00	\$ 0.00	1	\$ 35.61	\$ 0.00	\$ 0.00

Show required information.

## Editing Plan Pricing and the Effect on Renewals

It is important to inform pet owners of new pricing before increasing fees. Not providing sufficient notice before a monthly draft could result in clients refuting charges with their banking institutions out of confusion, or worse, cancellation requests. [Click this link](#) to download a sample renewal letter to inform clients. Customize your letter by adding the practice logo, info about base monthly fees, and any improvements you've made. Print and mail or email this letter to plan holders and keep a digital record of when and where your letter was sent inside your PIMS.

After you've given your pet parents adequate time to review your correspondence, you may safely update base monthly fees in your Petly Plans software. [Click this link](#) to review a Helpdesk article about updating pricing and the effects on renewal plans. These instructions assume the only changes made to your plans are with the base monthly fees. *If you've decided to add or remove items, contact a Petly Plans team member to determine a best path for implementing your proposed changes to avoid usage errors.*

When you update base monthly fees, you have the option to choose whether to apply the price change to upcoming renewal plans that are already configured, as noted below. Plan renewals automatically configure 60 days before a plan's end date. Review a report of plans with configured renewals before deciding to update all renewal plan prices. To run this report, go to *Menu > Reports > Wellness Plans*, and select *Build Custom Report*. In the *Wellness Plan Status* section in the upper left, under the *Inactive* column, check the *Renewal* box, which will automatically check the *Automatic Renewal* and *Manual Renewal* boxes. Scroll to the bottom of the screen and click *Generate Report*. We recommend informing your configured renewal clients of the price change prior to their renewal date. Visit the link at the beginning of this paragraph for additional instructions or speak to a Petly Plans team member for more info.

### Update Renewal Pricing prompt when the Base Monthly Fee field is edited

**Edit Plan Template** Canine Essential

EXPORT CANINE ESSENTIAL PLAN TEMPLATE

General Health Care Agreement Items

Plan Title \* Canine Essential

Abbreviation \* PPEC

Initial Fee \* 49.95

**Base Monthly Fee \* 55.00**

Non-Plan Item Discount \* 5

Plan Item Discount (%)

Species \* Canine

Active \* Active

Automatic Renewal Plan \* Canine Essential

We noticed you have changed the base monthly fee for this plan template.  
Would you like to update all upcoming renewal plans which have already been manually or automatically created?

Update Renewal Pricing

SAVE CANCEL

## Building a custom report of configured renewals

The screenshot shows a software interface with a dark blue sidebar on the left and a main content area on the right. The sidebar contains a search bar at the top, followed by menu items: Dashboard, Reports (highlighted with a red box), Admin, and Performance. Below these is a clock showing 01:47 PM on Monday, Dec. 06 2021. A list of reports is displayed, with 'Wellness Plans' highlighted by a red box and a mouse cursor. The main content area is titled 'Wellness Plans Report' and lists various report presets under the heading 'REPORT PRESETS'. At the bottom of this list, a button labeled 'BUILD CUSTOM REPORT' is highlighted with a red box and a mouse cursor.

This screenshot shows the configuration page for the 'Wellness Plans Report'. It features a back arrow and the text '< back to wellness plans report presets'. Under the heading 'ADVANCED FILTERS', there is a section for 'Wellness Plan Status:'. This section is divided into two columns: 'Active' and 'Inactive'. Under 'Active', there are checkboxes for 'In Progress' and 'On Hold'. Under 'Inactive', there are checkboxes for 'Canceled', 'Completed', and 'Plan Changed (legacy)'. The 'Renewal' checkbox is checked and highlighted with a red box. Below 'Renewal', there are two sub-options: 'Automatic Renewal' and 'Manual Renewal', both of which are also checked.

This screenshot shows two buttons at the bottom of the configuration page. The first button is green with a white checkmark and the text 'GENERATE REPORT', and it is highlighted with a red box. The second button is gray with a white 'x' and the text 'CANCEL'.



## Marketing

Ordering new brochures and flyers will help you easily spread the word about your updated plans. The Petly Plans design team can also customize and configure new service and price charts so pet owners who visit your website have the most current plan information. [Click the link](#) to visit the Petly Plans marketing site and peruse our wide array of marketing collateral. Be sure to add a note on your order form indicating your prices or services have changed.

### Example of a customizable puppy and kitten brochure

**Why Petly Plans?**  
Petly Plans provides preventive veterinary services for one year, with the cost divided into 12 affordable monthly payments. You can upgrade your plan as your pet ages.

**All plans include:**

- Preventive care examinations and core vaccines
- A puppy examination (on scheduled visits, not included in the plan)
- Additional discounts on eligible items not included in the plan

At Example Animal Hospital, we look forward to helping you provide your pet with the best possible care at every stage of life. Petly Plans helps us make it all come from affordable and convenient for you.

Ask one of our team members about Petly Plans and we'll have you signed up for your pet.

**vet clinic**  
(your logo here)

1-555-555-5555

12345 Address Avenue  
Address City, NE 21010

Monday-Friday 9:00 a.m.-6:00 p.m.  
Saturday 9:00 a.m.-2:00 p.m.

Connect with us on these social networks  
vetclinic.com

**Petly Plans**  
Brought to you by BIRRX

**Petly Plans overview**  
Help your pet get started on the right paw. Petly Plans offers an array of plan options to choose from and can be personalized to meet your unique pet's needs. What's even better, Petly Plans is good for your pet and your wallet.

**Our puppy and kitten plans**  
Silver includes all the preventive care examinations, core vaccines and basic laboratory tests necessary to help protect your pet against illness and disease. Gold is designed for comprehensive care during the first year of a pet's life and also includes our exclusive spay or neuter surgery package.

**Includes spay or neuter packages include:**

- Pre-surgical examination
- IV catheter & fluids
- Anesthesia
- Vital sign monitoring
- Surgical procedure
- Pain management
- 60-day

**Service guide**

	Silver	Gold
\$10.00 (Complimentary initial payment)	•	•
Technician office visits (unlimited)	•	•
Complimentary visit (unlimited)	•	•
Preventive care examination (up to 4)	•	•
Core vaccine series (based on age, breed and risk)	•	•
Intestinal parasite screen (up to 2)	•	•
Basic deworming treatment (up to 3 doses)	•	•
Leukemia and FIV screen (kittens)	•	•
Heartworm screen (puppies)	•	•
Pre-surgical blood work	•	•
Routine spay or neuter surgery package	•	•

**Membership fees and discounts**

	Silver	Gold
Initial membership fee	\$99.00	\$99.00
Multiple-pet discount	-\$10.00	-\$10.00
Monthly payment for puppies	\$25.00	\$50.00
Monthly payment for kittens	\$25.00	\$50.00
Discount perk on non-plan items	10%	10%
Average savings per year*	25%	25%

\*Average annual savings in the first year will be less the cost of the initial membership fee.

Plans can be personalized by adding additional services specific to your pet's needs.

**Restrictions**

- Plan is non-transferable.
- Plan cannot be applied to past visits.
- An appointment must be scheduled for services to be used.
- Additional discounts apply to eligible non-plan items only and cannot be used with other promotions and/or discounts.
- Additional costs may apply to out-of-state in the event the pet's needs warrant.
- Insurance is not a part, program or component of the time of surgery, additional fees will apply.

### Example puppy and kitten service guide

Service guide	Silver	Gold
Complimentary scheduled physical examination (unlimited)	•	•
Preventive care examination (up to 4)	•	•
Core vaccine series (based on age, breed and risk)	•	•
Intestinal parasite screen with Giardia	•	•
Basic deworming treatment (up to 3 doses)	•	•
Leukemia and FIV screen (kittens)	•	•
Heartworm screen (puppies)	•	•
Pre-surgical blood work	•	•
Routine spay or neuter surgery package	•	•
Microchip		•

### Example price sheet with prices disclosed

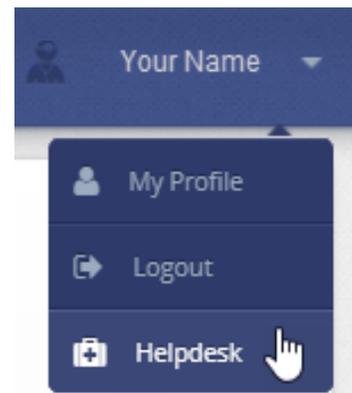
Membership fees and discounts	Silver	Gold
Initial membership fee	\$99.00	\$99.00
Multiple-pet discount	-\$10.00	-\$10.00
Monthly payment	\$25.00	\$50.00
Discount perk on non-plan items	10%	10%
Average savings per year*	25%	25%

\*Average annual savings in the first year will be less the cost of the initial membership fee.

## Staff Awareness

Any time you update your base monthly fees or make changes to your plans, it is pivotal to communicate these changes to your staff. Discuss these matters in a staff meeting to ensure all teams are poised to spread the word about your plan changes to pet owners.





## Additional Resources

Make sure your team is familiar with the different types of resources available on the Petly Plans Helpdesk. We've included some quick links for you below.

- [Download](#) the Guidebook to Managing Your Wellness Program.
- [Download and roleplay](#) with the Petly Plans Staff Scripts.
- [Review](#) the Plan Item Data Report Overview to isolate underutilized plan items.
- [Review](#) this article about Editing Wellness Plan Items.
- [Review](#) this article about Deactivating a WP Item in your PIMS.
- [Review](#) this article about Deactivating a Plan Item in Petly Plans.
- [Review and download](#) a sample renewal letter to clients.
- [Review](#) this article on Changing Plan Templates and the effects on renewal plans.
- [Petly Plans Marketing Page](#) to place a marketing order.
- [Petly Plans mock website](#) to help you design your practice's wellness plan pages.
- [Download images](#) for your website, newsletters, social media posts, and more.

