

Enrolling in Wellness Plans

Use the correct process for enrolling in a wellness plan & setting up the payment schedule.

Video: [How to Enroll in a Wellness Plan](#)

- This was updated in 2023 to streamline the steps.

Attach a Callback on the Annual Exam for Wellness Plan Patients

[How to Create a Callback \(Internal Reminder\)](#)

As a best practice, attach a callback to the pet's annual exam for 6-9 mos. out (depending on the plan and your hospital schedule). This enables your team to run a Patient Callbacks Reminder Report to contact clients about undelivered services before the plan expires.

Delivering Wellness Plan Services

All plan service items must be ordered from the patient's wellness plan screen.

Do NOT use quick invoicing to order wellness plan items.

- Quick invoicing is not a reliable way to order services and can lead to inaccurate reporting and production, especially when service items are packaged.

Review & Take Action on the "Payment Plan Failures" Email from Pulse

Pulse (eVet) sends a daily email to the main/general hospital email address with a list of failed transactions from payment plans and the reason for the failure.

Failed payments generate a past due invoice; contact the client to resolve the past due amount.

- If necessary to update the stored card, do this first from the wellness plan screen (instructions at link below) and then apply that card to the past due invoice.

Update Stored Cards for Wellness Plan Payments

Use the correct process for updating a stored card for wellness plan payments.

Instructions: [How to Update a Stored Card for Wellness Plans](#)

- This was updated in 2023 to streamline the steps.

Run the following reports weekly to audit wellness plan set up & payments. Completing this weekly helps prevent failed payments or resolve problems early so pets can continue to receive care and accounts don't become severely past due.

Review the "Active Wellness Plan Report" for the Previous Week

The is set up to automatically run daily for your hospital.

Check that the following is set up for the patient on the wellness plan screen:

- For monthly pay plans (new enrollments and renewed plans):
 - ✓ The box marked "Use last payment date in current plan...." is checked.
 - ✓ There is a stored credit card on file under the Payment Schedule section.
 - ✓ The payment schedule has the appropriate number of payments remaining.
 - ✓ The last payment on the plan should not go past the plan expiration date.
- For annual pay plans:
 - ✓ Ensure the plan was paid in full.
 - ✓ Auto Renew is NOT checked.

Run & Review the "Payment Plan Report" for the Previous Week

[How to run the Payment Plan Report](#)

When running this report check the following box:

- ✓ **Include error transactions**
- For error/failed transactions, check if there is still an outstanding past due invoice on the client's account, and if so
- Contact the client to resolve the past due balance; follow the [Wellness Plans Collections Policy & Process](#) to ensure you are abiding by debt collection practices and laws.

Track & Post Weekly Enrollment Results

Don't forget to track wellness plan enrollments and post the results so all team members can participate and be in the know!

Run & Review the "Patient Callbacks Reminder Report"

[How to run the Patient Callbacks Reminder Report](#)

- Review patient accounts for undelivered wellness plan services.
- Send a reminder message via Pulse/Pet Desk or contact via phone to inform the client of items due.
 - For larger package items it is best to call clients to inform them of the services still available on the plan, as well as expiration date of the wellness plan.

Note: if your hospital doesn't use callbacks, you can also generate a *new run* of the "Active Wellness Plan Report" and set the *Expiration Date Range* to review plans with upcoming expirations.

Earn a Monthly Enrollment Bonus Payout!

Hospital leaders can submit monthly enrollments to reward team members!

[Wellness Plans Bonus Payment Request Form](#)

- Bonus payments apply to new enrollments only (not renewals).
- There are two levels of bonus payment that can be achieved:
 - The standard bonus is \$10 per new enrollment.
 - If a hospital team meets or exceeds the goal of 1 new enrollment per Doctor Day (DVMD) during a given month, **the bonus increases to \$20 per new enrollment!**
- Hospital leaders decide to either allocate specific \$ amounts to team members or assign/split a % of the bonus among team members.
 - Bonus payments will be added to an employee's paycheck on the second pay period of the month (25th).
 - The request form is due each month by the 10th (to report on the previous month); late submissions will be paid on the second pay period of the following month.

We have hospitals achieving \$800-\$1,000 per month in enrollment bonus payouts!