

2023

# **WELLNESS PLAN PLAYBOOK**



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## Wellness Experts: A NEW Day At NewDay!

When it comes to the health of our pets, the age-old saying "an ounce of prevention is worth A pound of cure" holds true. Taking preventive measures early on can save us from the greater costs associated with treating advanced diseases or problems later. By promptly identifying and addressing any developing issues, we increase the chances of a positive outcome. Preventive healthcare for our pets involves A comprehensive approach, including thorough veterinary evaluations to assess their overall health and risks. Based on these findings, your veterinarian will provide recommendations regarding nutrition, dental care, vaccinations, and prevention of heartworm, fleas, and ticks. Moreover, these recommendations will be tailor-fit to your pet's specific health needs and risk factors. The NewDay team has put in A lot of effort to develop pet health wellness plans that focus on prevention and overall well-being. se the chances of early detection and successful treatment of any underlying conditions.

A wellness plan gives pets all the primary and preventive care they need to live A happy and healthy life. Pet parents will be able to keep up with their vaccine schedules and yearly exams, as well as their pets general wellness (healthy coat, vision, dental care).

### 2022 AAHA Canine Vaccination Guidelines

These Guidelines empower veterinarians to make the best possible personalized recommendations for their patients by determining which vaccines are essential for each individual dog.

**ALL DOGS** should have the following core vaccines:

- Distemper
- Adenovirus
- Parvovirus
- Parainfluenza
- Rabies

**SOME DOGS** Other vaccines are just as essential for based on their lifestyle and risk. These include:

- Leptospira (should be considered for all dogs based on increasing prevalence)
- Bordetella
- Canine influenza
- Rattlesnake toxoid
- Lyme disease

**For EVERY patient. ASK**

The vaccines required for ALL dogs + The vaccines required based on the dog's lifestyle and risk factors = Core for an individual patient

What should be added to the core vaccines for this dog?

**ASK**

- Does the dog travel out of state?
- Does the dog hike?
- Does the dog board or go to daycare?

For example, leptospirosis is a risk in many areas, and you may decide that the Leptospira vaccine is "core" for dogs in your practice.

**A GOOD RULE OF THUMB: When in doubt, VACCINATE!**

When vaccines are overdue or unknown, consider that the benefits of vaccinating outweigh the risks in most cases.

**Train your team to talk to clients about vaccines and why they are a vital part of their dog's health plan.**

**AAHA** [www.aaha.org/canine-vaccinations](http://www.aaha.org/canine-vaccinations)



VETERINARIANS RECOMMEND THAT CATS AND DOGS ARE TESTED AT LEAST **ONCE A YEAR!**

*Why?*

UNPROTECTED PETS ARE AT RISK FOR:

Kidney Disease  
Liver Disease  
Heartworm Infection

Cancer  
Diabetes  
And many more issues!

**Get A Full Picture Of Health!**  
Physical exams are important, but just a part of your pets overall health. Bloodwork provides information that you can otherwise not get.

**Determine A Baseline!**  
Establishing a baseline allows your vet to monitor even subtle changes as your pet ages to better detect and treat illnesses early on.

**Prepare for your pets needs!**  
Bloodwork helps your vet make better informed decisions, so they can treat your pet right away and ensure certain procedures and medications are safe.

A few small drops of blood is all it takes.

**Early diagnosis is KEY!**  
It can identify many diseases and gives your vet time to treat or even slow down progression.

It is important for pet parents to understand the commitment involved in these deferred payment plans. Upgrading the plan is possible at any time during the year, which allows flexibility for the pet parents. However, downgrading or canceling the plan is only possible at the end of the first contractual year. If pet parents need to cancel before that time, they would be responsible for either the retail value of the already received services or the remaining balance on the plan. This policy ensures transparency and helps manage the financial obligations related to the wellness plans.

	Puppy/Kitten	Adult	Adult+
Enrollment	\$48	\$48	\$48
Monthly Price	\$45	\$55	\$65
Annual Price	\$588	\$708	\$828
Package Value	\$1455	\$1625	\$2242
Yearly Savings	\$867	\$917	\$1414

# What can you expect in NewDay's new wellness plans?

NewDay constantly strives to improve our wellness-based service options to provide the best care for pets. In line with this, we have expanded our vaccination coverage to ensure that our furry friends are protected against a broader range of diseases.

Furthermore, we now offer recheck skin and ear cytological examinations as part of our comprehensive diagnostic services. These examinations help us monitor and evaluate any changes allowing for early detection and effective treatment of any underlying conditions.

To provide A more thorough assessment of the pet's overall health, we have also introduced comprehensive bloodwork panels. These panels include a wide range of tests that provide valuable insights into organ function, blood cell counts, and overall well-being.

In order to cater to the unique needs of pets at different stages of life, we have implemented an age/stage-based approach to our wellness plans. This tailored approach ensures that your pet receives the specific care and preventive measures required for their current life stage, promoting long-term health and well-being.

We are committed to continuously improving our services and offering comprehensive care options that address all aspects of your pet's health and wellness.

- Improve wellness-based service options
  - Expand vaccination coverage
  - Include recheck cytological examinations
  - Comprehensive bloodwork panels
  - Age/Stage of Life based approach
- Reduce mid-plan attrition or non-payment
  - Commonly post surgical or dental consumption
- Improve plan profitability
  - Focus on service-based components
  - Remove surgical and dental inclusion
    - Replace with packages and plan member discount



## To improve plan profitability and focus on service-based components, we have identified a few strategies to implement:

**1. Service-based components:** We will shift the focus of our plans towards services such as preventive care, vaccinations, comprehensive diagnostics, and in-depth physical exams. These plan will have higher profit margins compared to plans that include surgical and dental procedures. By removing surgical procedures we can reduce mid-plan attrition or non payment and ensure all of our clinics can provide these services, this enhance wellness plan profitability.

**2. Value-added services:** By providing A monthly newsletter with DVM-written education, you are offering valuable insights and knowledge to pet parents, helping them better understand their pets' health needs and how to provide optimal care. This not only promotes A stronger bond between pet parents and your clinic but also positions your clinic as a trusted source of information. The combination of educational content and preventative wellness services provided in our wellness plans will undoubtedly enhance the appeal and the trust of pet parents and contribute to the profitability of our plans. Keep up the excellent work in delivering excellent education and preventative wellness services to your highly engaged pet parents!

By focusing on wellness-based components, creating separate packages for surgical and dental procedures, offering plan member discounts, and providing value-added services, we aim to improve plan profitability while still providing comprehensive care options for our patients.

### New Plans VS Old Plans

	Core	Vital	Premium
Camp & Care	\$30	\$30	\$30
Boarding/Day Camp	2	4	6
All Other Services	5%	10%	15%
Pay in Full Discount	N/A	N/A	N/A

	Puppy/Kitten	Adult	Adult+
Camp & Care	\$30	\$30	\$30
Boarding/Day Camp	4	4	4
All Other Services	10%	10%	10%
Pay in Full Discount	10%	10%	10%

## What is the benefit of offering a paid in full discount?

**Improved client retention:** Offering a paid in full discount can encourage clients to commit to A longer-term relationship with your business. By paying for services or products upfront, they are more likely to continue using your services and remain loyal customers.

**Reduced administrative work:** With upfront payment, there is no need to manage ongoing billing or follow up on outstanding payments. This saves time and resources that can be allocated to other important tasks.

**Enhanced customer satisfaction:** Providing A paid in full discount can be seen as A gesture of appreciation towards your customers. It can make them feel valued and rewarded for their commitment. This positive experience can lead to higher customer satisfaction and loyalty.

**Lower risk of non-payment:** With upfront payment, the risk of non-payment or late payments is significantly reduced. This provides more financial security for your business and minimizes collection efforts or potential losses.

**Competitive advantage:** Offering A paid-in-full discount can differentiate your business from competitors who may not provide this option. It can attract customers who value upfront savings and contribute to your overall market position.

	Puppy/Kitten	Adult	Adult+
Enrollment	\$48	\$48	\$48
Monthly Price	\$45	\$55	\$65
Annual Price	\$588	\$708	\$828
Package Value	\$1455	\$1625	\$2242
Yearly Savings	\$867	\$917	\$1414
Paid In Full Savings	\$58.80	\$70.80	\$82.80



## How do our teams enroll new customers in the new plans?

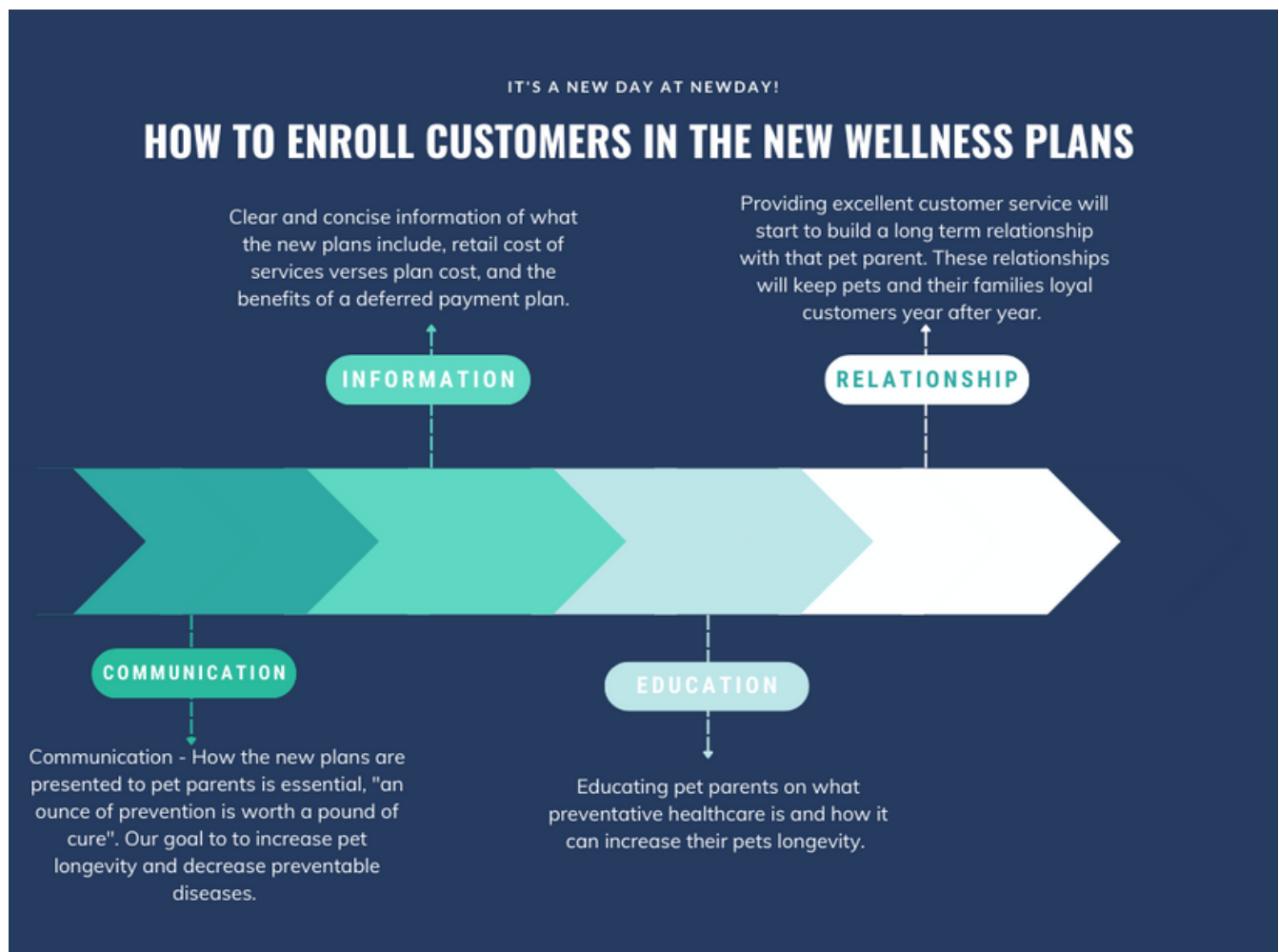
Enrolling new customer in the new wellness plans requires effective communication and showcasing the unique benefits of our plans. Here are A few steps to help you sell the new wellness plans:

1. **Understand your customers:** Before approaching the pet parent, it's essential to understand their needs and preferences. Research their pets medical history and gather insights into their pet care habits and concerns.
2. **Highlight the unique features:** Clearly communicate the distinctive aspects of our wellness plans that sets it apart from others in the market. This could include comprehensive coverage, access to specific services or treatments, flexible payment options, or additional perks like camp and care.
3. **Emphasize cost savings:** Show customers how our wellness plans offers cost savings compared to traditional pay-as-you-go veterinary services. Break down the potential expenses they would incur for routine check-ups, vaccinations, preventive treatments, and compare it with the cost of your plan. This can help customers see the value and long-term savings your plan provides.
4. **Provide educational resources:** Educate customers about the importance of preventive care and how our wellness plans specifically addresses those needs. Offer educational materials such as brochures, website content, or videos that explain the benefits of regular check-ups, dental care, parasite prevention, and other preventive measures.
5. **Offer customization and flexibility:** Present your pet wellness plan as flexible and customizable to meet individual pet's needs. Some customers may prefer a basic plan, while others may want more comprehensive coverage. Tailor your plan options and allow customers to choose the level of coverage that suits their requirements and budget.
6. **Provide testimonials and case studies:** Share success stories and testimonials from existing customers who have benefited from your pet wellness plan. Hearing positive experiences from others can build trust and credibility and increase the likelihood of new customers opting for your plan.



**7. Provide exceptional customer service: Ensure that your customer service is top-notch. Be responsive, friendly, and knowledgeable when addressing customer inquiries or concerns. Going above and beyond to provide a positive experience will build trust and increase customer satisfaction.**

**Remember, effective selling involves understanding your customers' needs, demonstrating value, and building trust. By following these steps, you can effectively sell your different pet wellness plan to customers.**



## How do our teams retain current wellness plan customers?

**Communication is key:** Clearly communicate the changes to the wellness plans in advance. By scheduling pet parents to come in for an appointment with the DVM you can discuss the changes to the current plans in person and how they will affect the pet parent. Since our new plans are based around preventative care, it is important for the pet parent to discuss any health concerns with veterinarian, the veterinarian and support staff can then highlight how the changes align with the pet's needs and address any concerns the pet parent might have.

**Provide information on the flexibility and customization:** At NewDay we recognize that every pet is unique, and their wellness needs may vary. Offer flexible upgrade options within the plans, allows veterinarians to tailor the plan to the pet's specific requirements. This ensures that the pet parent feels heard and valued, increasing their commitment to NewDay and their pet's wellbeing.

**Continuously improve and innovate:** At NewDay we stay updated on the latest industry standards, and regularly evaluate and enhance the standard of care at all NewDay locations, the New wellness plans are a byproduct of NewDay's mission to provide excellent care to pets and people. At NewDay we are committed to providing the best possible care for pets.

**Exceptional customer service:** Providing exceptional customer service at every touchpoint. Being responsive to inquiries, address concerns promptly, and go above and beyond to make your customers feel appreciated. Building strong teams, relationships, and trust is essential for customer retention.

Remember, retaining customers is not only about making the transition smooth but also about delivering ongoing value and building lasting relationships. By implementing these strategies, you can increase customer satisfaction, loyalty, and long-term commitment to you NewDay and wellness plans.

# Pet Parent Renewal Communications

Run Renewal Report For A List Of  
Up Coming Renewals

Reach Out To Pet Parents &  
Schedule Office Visit (Use The  
Remaining Services On WP As A  
Reason To Come In)

If You Do Not Reach Pet Parent  
Leave A Voicemail & Send Text  
Message

Explain The Differences In The Adult  
& Adult+ Plans

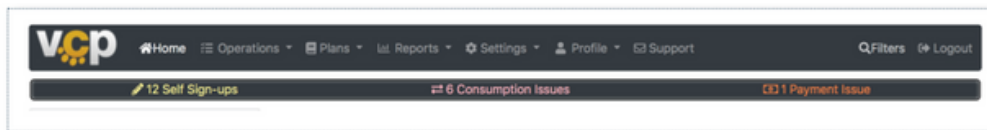
Address Any Cost Increases As  
Providing A Plan That Is Focused On  
The Health & Longevity Of Their  
Pet!

Remember, retaining customers is  
not only about making the  
transition smooth but also about  
delivering ongoing value and  
building lasting relationships. At the  
end of the Day, our goal at NewDay  
is for pets to be happy & healthy!

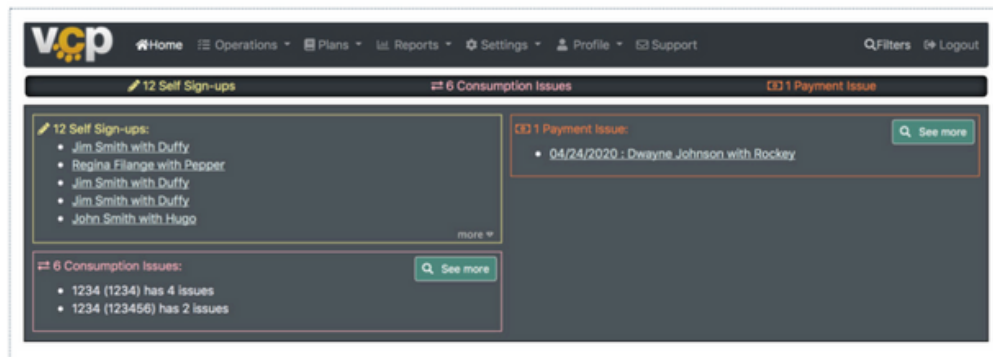
# 02

## Command Center: Wellness Plan Management

The Command Center is the first line of defense when it comes to managing your wellness plans. The Command Center is the black bar located under the menu bar.



If there are not any actions to be taken you will see A green "All Is Good" in the command center. When there are actions that need to be taken, the command center will highlights them by listing the issue in the summary line. You can simply click on the summary item, this will expand the control center allowing you to correct the issue.



The following are the key command center categories, that may appear in the summary bar, and why they are important to address.

## Expiring Card

**What:** This means A card IS expiring this month.

**Action:** Reach out to customer and update payment information either directly from the customer or by prompting them to use the VCP where they can enter their own information through a secure portal.

**Why:** If the payment method is updated you can avoid A potential missed payment and/or the plan not renewing. These issues are for a card that has not yet expired and should be addressed. Failing to correct the issue will lead to A missed payment either in the current month or the following month, depending on payment and renewal dates, and again resulting in a payment or renewal issue.

The screenshot displays a web interface for a pet management system. On the left, a sidebar menu includes options like 'Customer', 'Customer Detail', 'Available Services with History', 'Tools', 'Cancel Plan', 'Post Memo', 'Activity Log', 'Action Queue', 'Transactions', 'Customer Communication', and 'Users'. The main content area is titled 'Customer: 401704 - Sheri Gifford - Trixie'. It features a 'Update Payment Information' section with a note about ensuring security and card accuracy for expiring cards. Below this, there's a form to 'Add or Update a card, click here'. The payment details shown are: Payment Type: Master Card, Account Number: \*\*\*\*\*-4925, Account Name: Sheri Gifford, Expiration Date: 7-2023, Address: 10029 Sadele Gate Court, Address2: , and City: Jacksonville, FL 32219, United States. On the right, a summary box shows a balance due of \$0.00, the next payment due on Aug 15, 2023, and the last payment of \$66.00 on Jul 15, 2023. A 'Make Payment' button is also present.

Customer: 401704 - Sheri Gifford - Trixie

**Update Payment Information**

**Note:** To further ensure security and card accuracy, the credit card number and the new expiration date, must be entered for expiring cards.

To **Add** or **Update** a card, click here

Payment Type: Master Card

Account Number: \*\*\*\*\*-4925

Account Name: Sheri Gifford

Expiration Date: 7-2023

Address: 10029 Sadele Gate Court

Address2:

City: Jacksonville, FL 32219, United States

Balance Due Now: \$0.00

Next Payment: Aug 15, 2023

Last Payment: \$66.00 on Jul 15, 2023

Statements/Payments

**Make Payment**

**Payment Issues - At Practice Level Only Payment issue.**

**Definition:** The payment issue has been turned over to the practice to manage. VCP has already followed their initial collection where they were unable to collect payment.

**Action:** Reach out to the customer to collect payment and reinstate the plan.

**Why:** To collect the practice's money. **Note:** If nothing is done, the plan will auto-cancel after 90 Days. Payment issues assigned back to the practice should be reviewed on A regular basis. Often, the issue is simply an expired card and the call center has not been able to reach the pet owner, or the pet owner would rather talk to someone they know at the practice.

## Auto-Cancels

**What:** After 90 days from the beginning of A rejected payment, the system will auto-cancel the plan if action isn't taken and documented in the system. If no action is taken, the plan will auto-cancel in 30 days. This means that no action by the practice has been taken, or has not been documented with A memo in the system, in the last 60 days.


**Actions:** Attempts to reach this customers should be made weekly in the first 30 days, followed by monthly attempt after.

**Why:** A customer who misses two payments and has A \$25.00 late fee, is very unlikely the to settle the account where the VM can reinstate the plan.

You can see this account has not made A payment since March 16th 2023, this customer currently owes four monthly payments and the \$25 late fee bringing the total amount due to \$233.00.

**Note:** This plan did not auto-cancel because there was activity on the account. The VCP Auto-cancel system ONLY works if there is NO activity on the account.

Customer: 287913 - Vinicius Charpinel



**Chico**

- Adult Male Canine
- Pomeranian
- On Canine Vital Plan\* ✓



[Add Additional Pet](#)

**Account Alerts**

- Account is suspended. Reason: Practice Managing Payment Issue
- Account has payment issues.

**Plan Details** [Action](#)

Merchant: NewDay Veterinary Care - Bartram Clinic

Name: **Vinicius Charpinel**  

Customer Since: Oct 22, 2021

Plan Id: 1000322353

Account#: 287913

Wellness Plan: Canine Vital Plan\*

PIIMS Client ID: 17572

PIIMS Patient ID: 23068

Current Services Start on: Oct 22, 2022

Current Services Expire on: Oct 21, 2023

Plan Status: Active

**Billing Information** [Action](#)

Monthly Payment: \$52.00

Plan Amount: \$624.00

Plan Contract Balance: \$312.00

Unpaid Fees: \$25.00

Final Scheduled Billing Date: Sep 15, 2023

Remaining Scheduled Billings: 2

Billing Status: **Suspended - Practice Managing Payment Issue**

Suspended Date: Jul 24, 2023

**Balance Due Now**  
\$233.00

**Next Payment**  
Aug 15, 2023

**Last Payment**  
\$52.00 on Mar 16, 2023

[Statements/Payments](#)

[Make Payment](#)

**Statements**

Date	Statement#	Amt
Jul 14, 23	01710397	\$233.00
Jun 14, 23	01657282	\$181.00
May 14, 23	01604329	\$129.00
Apr 14, 23	01551506	\$52.00
Mar 14, 23	01498521	\$52.00
Feb 14, 23	01446018	\$52.00

**Memos** [All Memos](#)

✉ Jul 24, 23(M. Alvidre): Plan has been suspended. Reason: Practice Managing Payment Issue.

✉ Jul 24, 23: Final Attempt Payment Failure - Automated call has been made.

**Customer**

**Customer Detail**

[Available Services with History](#)

**Tools**

[Cancel Plan](#)

[Post Memo](#)

[Activity Log](#)

[Action Queue](#)

[Transactions](#)

[Customer Communication](#)

[Users](#)

If you are unsure of the payments that were made or dates you can use the Statements/payments link above Make Payment, using this will allow you a clear picture on what payments were and were not made.

Home
 Operations
 Plans
 Reports
 Settings
 Profile
 Support
 Logout

**Chico**

- Adult Male Canine
- Pomeranian
- On Canine Vital Plan\* ✓

[Add Additional Pet](#)

**Customer**

**Customer Detail**

Available Services with History

**Tools**

Cancel Plan

Post Memo

Activity Log

Action Queue

Customer: 287913 - Vinicius Charpinel - Chico

**Statements/Payments**

Type: All Search

Entry Date	Type	Statement#	Statement Date	Payment Date	Amount
Jul 12, 2023 10:07:29 PM	Statement	01710397	Jul 14, 2023		\$233.00
Jun 12, 2023 10:10:32 PM	Statement	01657282	Jun 14, 2023		\$181.00
May 11, 2023 10:28:33 PM	Statement	01604329	May 14, 2023		\$129.00
Apr 12, 2023 10:13:59 PM	Statement	01551506	Apr 14, 2023		\$52.00
Mar 16, 2023 03:20:11 AM	Payment	01498521		Mar 16, 2023	\$52.00
Mar 12, 2023 10:29:48 PM	Statement	01498521	Mar 14, 2023		\$52.00
Feb 16, 2023 01:05:56 AM	Payment	01446018		Feb 16, 2023	\$52.00
Feb 12, 2023 10:23:49 PM	Statement	01446018	Feb 14, 2023		\$52.00
Jan 15, 2023 08:34:52 PM	Payment	01399971		Jan 15, 2023	\$52.00
Jan 12, 2023 10:39:20 PM	Statement	01399971	Jan 14, 2023		\$52.00
Dec 15, 2022 10:30:29 PM	Payment	01363619		Dec 15, 2022	\$52.00
Dec 12, 2022 10:40:57 PM	Statement	01363619	Dec 14, 2022		\$52.00
Nov 15, 2022 11:52:52 PM	Payment	01327135		Nov 15, 2022	\$52.00
Nov 10, 2022 10:26:55 PM	Statement	01327135	Nov 14, 2022		\$52.00
Oct 15, 2022 06:48:14 PM	Payment	11431054		Oct 15, 2022	\$52.00

## New App

**What:** New application created in the last 3 months and has not been completed or canceled.

**Action:** Should this be completed or canceled?

**Why:** It is A good practice to follow up with pet owners that started applications as they might want to still sign up. Additionally, you might find plans that have not been Completed, which means that they are not billing. The new application warning means an application has not been completed. This might be fine, as the client wanted to take the application home and discuss it. However, we provide this warning to remind busy team members not to forget to complete the application. Automated billing will NOT start without A completed application. It is also a good practice to follow-up with pet owners to find out if they are still interested in the plans and if not, cancel plans that are not going to be completed.



## Renewal Issues Active Plan

**What:** A plan is active and will not renew due to outstanding issues with the account. Billing Status is Ongoing, Paid-off or Suspended.

**Action:** Address issue or dismiss action queue item.

**Why:** You want to renew as many members as possible, so rectifying renewal-blocking issues is key. If A plan is set to auto renew and has an issue at the time of renewal, it will not renew. Issues need to be addressed before the renewal date and, depending on timing, may need A user to renew the plan manually as the cut-off date has passed. If a plan does not renew and expires, the system will charge A new origination fee.

## Consumption Issue

**What:** Consumption errors that are open (not dismissed, consumed).

**Action:** Practice needs to correct the issue.

**Why:** To ensure proper revenue recognition, consumption, production pay, accurate cancelation logic, and service consumption history on the pet owner portal. It is important to update any consumption errors to ensure that the information about services used and available is current. This will ensure that the travel sheets are updated and the information your client sees on their portal is current. Also, if production pay is applied, errors need to be rectified to make sure production pay reports and amounts are correct.

## Self-Signup

New pre-enrollment self-signup application is not complete.

**Action:** Review, and if the plan was supposed to have been completed, then do so. Otherwise, call the client to set up an appointment

**Why:** You should follow up with pet owners that have expressed an interest in your plans and note that plans in this state are NOT billing. This alert is for enrollments done online during pre-enrollment. The pre-enrollment process requires you to reach out and set up a wellness visit, then the client comes in and the enrollment is completed and funds collected for enrollment and the first month's payment. An incomplete message means the client did not fill out all the pre-enrollment information and you should reach out as well. Applications that are not moving forward to live plans should be cancelled.

# 03

## Reporting: Understanding Where to Find Reports & How They Can Drive Successful Plans

The Activity Report has been updated to provide more details on what is going on with your wellness plans and is available in A quick summary overview and A detailed report. These reports are meant to be used as tools to help you quickly see wellness plan activity and to see services used and the value of those services. Understanding the number of expired services is also important, as too many expired services means your clients are not using all that is offered in the plans and may not recognize the full value, potentially leading to lower renewal rates.

### Summary Report:

This report provides an overview of new plan enrollments, cancelled plans, number of plans that were up for renewal and number of plans that did renew over the period requested. The report also provides an overview of the services performed and the value of those services. It will also show you the number of services that expired during the time period (unused services on plans that expired).

- 1 New Enrollments During Time Period.
- 2 Number of Plans that were cancelled
- 3 Number of Plans up for renewal During Time Period
- 4 Actual number of Plans that renew During Time Period

Date Range: Jun 01, 2023 - Jun 30, 2023						
Date Generated: Jul 27, 2023						
Enrollments						
Plan	New Enrollments	Written-Offs	Enrollments	Renewal	Up for Renewal	Renewal %
Canine Core Plan*				2		0.00%
Canine Core Plan**	3	3	3	1	1	100.00%
Canine Premium Plan*	5		5	12	5	42.00%
Canine Vital Plan*	2		2	6	4	67.00%
Feline Core Plan*				1		0.00%
Total	10		10	22	10	45.45%

## Detail Report:

This version of the report provides the details behind the summary report, providing A view of all plans signed up during the period requested, along with the payment amount (monthly payment or paid in full). This report also shows the individual who completed the enrollment.

The Services area provides A list of all services provided along with any services that may have expired on plans that matured during the time period. The expired plan price may show as A negative IF the service had been listed as expired during the period, but then the service was unexpired by A Super Admin user and then consumed.

Services											
Service CD	Service	Date	Delivered By	Client ID	Client	Pet ID	Pet	Option Status	Quantity	Plan Price	Quantity Plan Price
100	Physical Exam	Jun 02, 2023	Gary Johnson	20008	Juli Stotz	26461	Pepper	Consumed	0	\$0.00	1 \$35.00
B15	Medical Waste	Jun 02, 2023	Gary Johnson	20008	Juli Stotz	26461	Pepper	Consumed	0	\$0.00	1 \$0.00
100	Physical Exam	Jun 02, 2023	Gary Johnson	3960	Joann Car	4914	Benji	Consumed	0	\$0.00	1 \$35.00
B15	Medical Waste	Jun 02, 2023	Gary Johnson	3960	Joann Car	4914	Benji	Consumed	0	\$0.00	1 \$0.00
100	Physical Exam	Jun 02, 2023	Gary Johnson	24162	Demonia	132309	Harley	Consumed	0	\$0.00	1 \$35.00
405	Heartworm Te	Jun 02, 2023	Gary Johnson	26895	Teresa Ha	36093	NACHO	Consumed	0	\$0.00	1 \$20.00
DNT01	Dental Prophy	Jun 02, 2023	Gary Johnson	24162	Demonia	132309	Harley	Consumed	0	\$0.00	1 \$120.00
199	Electrocardiogr	Jun 02, 2023	Gary Johnson	24162	Demonia	132309	Harley	Consumed	0	\$0.00	1 \$15.00
200	Blood Pressur	Jun 02, 2023	Gary Johnson	24162	Demonia	132309	Harley	Consumed	0	\$0.00	1 \$15.00
201	Pulse Oximetry	Jun 02, 2023	Gary Johnson	24162	Demonia	132309	Harley	Consumed	0	\$0.00	1 \$15.00
620	Ear Cytology	Jun 02, 2023	Gary Johnson	24162	Demonia	132309	Harley	Consumed	0	\$0.00	1 \$25.00
100	Physical Exam	Jun 03, 2023		15608	Robert K	20417	Copper	Expired	20	\$700.00	0 \$0.00
405	Heartworm Te	Jun 03, 2023		15608	Robert K	20417	Copper	Expired	1	\$20.00	0 \$0.00
227	Interstate Heal	Jun 03, 2023		15608	Robert K	20417	Copper	Expired	1	\$50.00	0 \$0.00
DC1	DayCare	Jun 03, 2023		15608	Robert K	20417	Copper	Expired	2	\$0.00	0 \$0.00
123	Rabies 1yr	Jun 03, 2023		15608	Robert K	20417	Copper	Expired	1	\$15.00	0 \$0.00
124	Rabies 3yr	Jun 03, 2023		15608	Robert K	20417	Copper	Expired	1	\$15.00	0 \$0.00
B15	Medical Waste	Jun 03, 2023		15608	Robert K	20417	Copper	Expired	20	\$0.00	0 \$0.00
102	DAPP 3wks	Jun 03, 2023		15608	Robert K	20417	Copper	Expired	1	\$15.00	0 \$0.00
103	DAPP 1yr	Jun 03, 2023		15608	Robert K	20417	Copper	Expired	1	\$15.00	0 \$0.00
104	DAPP 3yr	Jun 03, 2023		15608	Robert K	20417	Copper	Expired	1	\$15.00	0 \$0.00
107	Bordetella Intr	Jun 03, 2023		15608	Robert K	20417	Copper	Expired	2	\$30.00	0 \$0.00
PS26	Pyrantel Pamo	Jun 03, 2023		15608	Robert K	20417	Copper	Expired	3	\$15.00	0 \$0.00
402	Intestinal Para	Jun 03, 2023		15608	Robert K	20417	Copper	Expired	2	\$40.00	0 \$0.00
620	Ear Cytology	Jun 03, 2023		15608	Robert K	20417	Copper	Expired	1	\$25.00	0 \$0.00
621	Skin Cytology	Jun 03, 2023		15608	Robert K	20417	Copper	Expired	1	\$25.00	0 \$0.00
TEL01	Telemedicine	Jun 03, 2023		15608	Robert K	20417	Copper	Expired	2	\$96.00	0 \$0.00
100	Physical Exam	Jun 05, 2023	Isabelle Roese	15048	Christian	19655	Miles	Consumed	0	\$0.00	1 \$35.00
620	Ear Cytology	Jun 05, 2023	Isabelle Roese	15048	Christian	19655	Miles	Consumed	0	\$0.00	1 \$25.00
B15	Medical Waste	Jun 05, 2023	Isabelle Roese	15048	Christian	19655	Miles	Consumed	0	\$0.00	1 \$0.00
100	Physical Exam	Jun 06, 2023	Dr. Savick	13502	Jennifer N	26052	Bowser	Consumed	0	\$0.00	1 \$35.00
B15	Medical Waste	Jun 06, 2023	Dr. Savick	13502	Jennifer N	26052	Bowser	Consumed	0	\$0.00	1 \$0.00
124	Rabies 3yr	Jun 06, 2023	Dr. Savick	13502	Jennifer N	26052	Bowser	Consumed	0	\$0.00	1 \$15.00
123	Rabies 1yr	Jun 06, 2023	Dr. Savick	13502	Jennifer N	26052	Bowser	Consumed	0	\$0.00	1 \$15.00
104	DAPP 3yr	Jun 06, 2023	Dr. Savick	13502	Jennifer N	26052	Bowser	Consumed	0	\$0.00	1 \$15.00
B15	Medical Waste	Jun 07, 2023	Gary Johnson	8773	Kelley G	33991	May Gast	Consumed	0	\$0.00	1 \$0.00
100	Physical Exam	Jun 07, 2023	Gary Johnson	8773	Kelley G	33991	May Gast	Consumed	0	\$0.00	1 \$35.00
402	Intestinal Para	Jun 09, 2023		20600	LaDonna	27302	Delilah	Cancelled	0	\$0.00	0 \$0.00
620	Ear Cytology	Jun 09, 2023		20600	LaDonna	27302	Delilah	Cancelled	0	\$0.00	0 \$0.00

The Cancellation Report has been updated to provide more details on what is going on with your canceled wellness plans and is available in A quick summary overview and A detailed report. This report is meant to give you important information about the health of your wellness plans, by allowing you detailed information on when and why plans are being canceled. Utilize the data provided in this report create an action plan to help combat cancellations.

## Summary Report:

This report provides an overview of the type of plan canceled, A time frame of when the plan cancelled, and the total number of plans cancelled.

Date Range: Jun 01, 2023 - Jun 30, 2023					
Date Generated: Jul 27, 2023					
Plan	Cancellations	Cancellations within 30 days	Cancellations 31-90 days	Cancellations 91-180 days	Cancellations 181+ days
Canine Core Plan**	1				1
Canine Vital Plan*	2				2
Canine Premium Plan*	3			2	1
Canine Core Plan*	1				1
<b>Total</b>	<b>7</b>	<b>0</b>	<b>0</b>	<b>2</b>	<b>5</b>

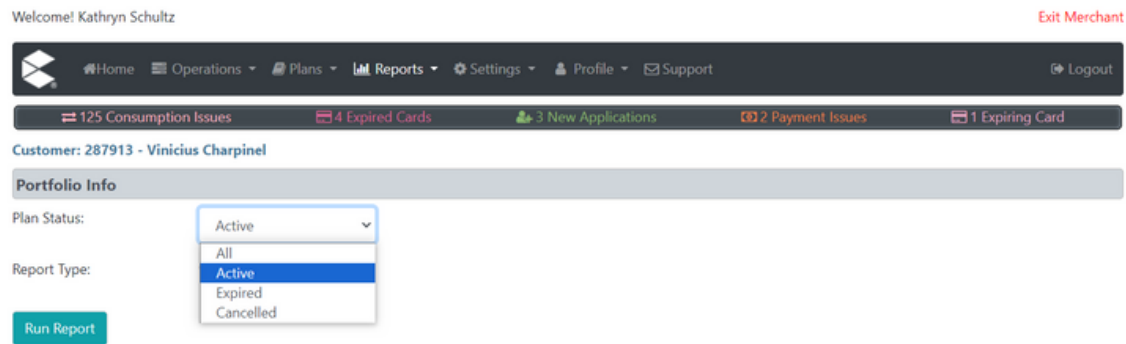
## Detail Report:

This version of the report provides the details behind the summary report, providing A view of all plans cancelled during the period requested, along with the payment amount (monthly payment or paid in full), the reason the plan was cancelled, total cash collected for the lifetime of the plan, and the contract amount.

Date Range: Jun 01, 2023 - Jun 30, 2023											
Date Generated: Jul 27, 2023											
Client ID	Client	Pet ID	Pet	Plan ID	Plan	Date Created	Cancel Date	Last Add Optional Service Date	Cancellation Reason	Plan Contract Amount	Total Cash Collected
20837	Christian Mills	27632	Shilo	1000431367	Canine Core Plan*	Jun 24, 2022	Jun 9, 2023		Moving	\$450.00	\$304.00
11502	Jennifer Neiger	17552	Ariel	1000340182	Canine Core Plan**	Dec 10, 2021	Jun 20, 2023		Moving	\$912.00	\$760.00
12752	Isamartha Jenkins	16509	Sula	1000351432	Canine Premium Plan*	Jan 10, 2022	Jun 9, 2023		Moving	\$1,584.00	\$1,056.00
20600	LaDonna Carlisle	27302	Delilah	1000490388	Canine Premium Plan*	Feb 3, 2023	Jun 9, 2023		Moving	\$792.00	\$66.00
20726	John & Tracey Levey	32576	Corralius	1000511747	Canine Premium Plan*	Jan 17, 2023	Jun 20, 2023		No Longer Have Pet	\$792.00	\$396.00
10850	Elizabeth Ford	11943	Kobe	1000340081	Canine Vital Plan*	Dec 10, 2021	Jun 28, 2023		Auto-Cancel by System	\$1,176.00	\$1,072.00
15944	Antonio Burgess	20874	Coco	1000401666	Canine Vital Plan*	Apr 22, 2022	Jun 28, 2023		Auto-Cancel by System	\$624.00	\$572.00
Total										\$6,336.00	\$4,226.00

## Portfolio Report:

The portfolio report provides the most up to date view on current plans at A location. The portfolio report can run for A complete list of Active plans, cancelled plans, and expired plans.



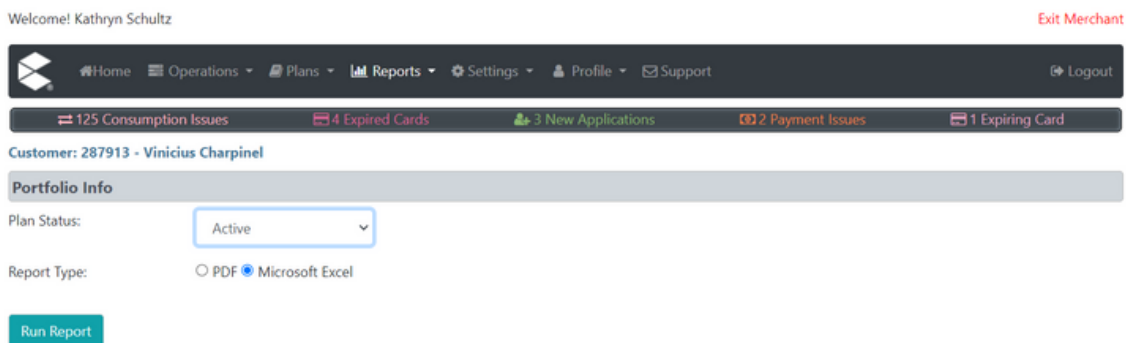
Portfolio Report interface showing the Plan Status dropdown menu. The dropdown is open, displaying options: Active, All, Active (highlighted), Expired, and Cancelled. The Run Report button is visible below the dropdown.

Plan Status:

Report Type:

## Note:

Always run this report so you can export it to excel.



Portfolio Report interface showing the Report Type radio buttons. The Microsoft Excel radio button is selected. The Run Report button is visible below the radio buttons.

Plan Status:

Report Type: ☐ PDF ☒ Microsoft Excel

Once you have run your report and opened it in excel you will see there is tons of data, depending on what you need you can remove a lot of the excess data. I generally remove the client ID, the pet ID, plan ID, optional services, and sub status.

## Portfolio Report Explained

If you run an "Active" portfolio report you will potentially find four types of plans.

Active - New

Active - Ongoing

Active - Paid Off

Active - Suspended

This indicators will be located in plan status and billing status.

Plan status - Because you have run an "Active" portfolio report all the plans will have the "Active Plan Status" See column H bellow. Active indicates that the plan is currently active, it has not been cancelled and it has not expired.

Billing status - The billing status indicates where the plan is at in the billing lifecycle, meaning the plans could be New, On-going, Paid off, or Suspended.

New Plans - New plans can indicate two things, this is a new client with A completely new plan OR it can indicate that the plan is a recent renewal. In order to decipher A new plan versus A renewal, you can check column M ITD.

A	B	C	D	E	F	G	H	I	J	K	L	M	N
Client	Pet Name	Plan	Converted Pla	Origination I	Current Service S	Current Servi	Plan Stati	Billing St	Plan Amount	Enrollment Fee it	Monthly Payment	ITD Payments	Last Payment Date
Cindy Odekirk	Roxy	Canine Core Pl	Yes	Dec 10, 2021	Jun 01, 2023	May 31, 2024	Active	Ongoing	\$456.00	\$0.00	\$38.00	\$988.00	Jul 15, 2023
Claudia Suarez	Max	Canine Premium	Yes	Mar 09, 2022	Aug 23, 2022	Aug 22, 2023	Active	Paid-off	\$792.00	\$0.00	\$66.00	\$1,584.00	Jul 15, 2023
Cristi Hart	Lilo	Canine Core Pl	No	Jan 05, 2023	Jan 05, 2023	Jan 04, 2024	Active	Ongoing	\$456.00	\$48.00	\$38.00	\$266.00	Jul 16, 2023
DANGELA GILBERT	OREO	Canine Premium	No	Jun 15, 2023	Jun 15, 2023	Jun 14, 2024	Active	Ongoing	\$792.00	\$48.00	\$66.00	\$132.00	Jul 16, 2023
Dana Ginley	Roxy	Canine Premium	No	Mar 15, 2022	Mar 15, 2023	Mar 14, 2024	Active	Ongoing	\$792.00	\$0.00	\$66.00	\$1,122.00	Jul 15, 2023
Dana Ginley	Rvca	Canine Premium	No	Mar 15, 2022	Mar 15, 2023	Mar 14, 2024	Active	Ongoing	\$792.00	\$0.00	\$66.00	\$1,122.00	Jul 15, 2023
Darby Devane	Oakley	Canine Core Pl	No	Jun 29, 2023	Jun 29, 2023	Jun 28, 2024	Active	Suspended	\$456.00	\$48.00	\$38.00	\$38.00	Jun 29, 2023
									\$113,520.00	\$3,264.00	\$9,460.00	\$150,362.00	

D	E	F	G	H	I	J	K	L	M	N	O	P
Converted Pla	Origination I	Current Service S	Current Servi	Plan Stati	Billing St	Plan Amount	Enrollment Fee it	Monthly Payment	ITD Payments	Last Payment Date	Remaining Plan Balance	Promo Code
15	Dec 10, 2021	Jun 01, 2023	May 31, 2024	Active	Ongoing	\$456.00	\$0.00	\$38.00	\$988.00	Jul 15, 2023	\$380.00	
15	Mar 09, 2022	Aug 23, 2022	Aug 22, 2023	Active	Paid-off	\$792.00	\$0.00	\$66.00	\$1,584.00	Jul 15, 2023	\$0.00	
15	Jan 05, 2023	Jan 05, 2023	Jan 04, 2024	Active	Ongoing	\$456.00	\$48.00	\$38.00	\$266.00	Jul 16, 2023	\$190.00	
15	Jun 15, 2023	Jun 15, 2023	Jun 14, 2024	Active	Ongoing	\$792.00	\$48.00	\$66.00	\$132.00	Jul 16, 2023	\$660.00	
15	Mar 15, 2022	Mar 15, 2023	Mar 14, 2024	Active	Ongoing	\$792.00	\$0.00	\$66.00	\$1,122.00	Jul 15, 2023	\$462.00	
15	Mar 15, 2022	Mar 15, 2023	Mar 14, 2024	Active	Ongoing	\$792.00	\$0.00	\$66.00	\$1,122.00	Jul 15, 2023	\$462.00	
15	Jun 29, 2023	Jun 29, 2023	Jun 28, 2024	Active	Suspended	\$456.00	\$48.00	\$38.00	\$38.00	Jun 29, 2023	\$418.00	
						\$113,520.00	\$3,264.00	\$9,460.00	\$150,362.00		\$59,176.00	

## Payment Issues List

Located under the Operations tab, you have two different options. YOUR payment options and Current Payment Cases.

Welcome! Kathryn Schultz Exit Merchant

Home Operations Plans Reports Settings Profile Support Logout

202 Consumption Issues 18 Payment Issues 1 New Application 1 Expiring Card

### Payment Issue List

☐ Current Payment Cases ☒ YOUR Payment Issues How-To ?

Plan Disposition: ☒ All ☐ ALERT - Auto-cancel This Month Plan Type: All Search Export

\* - Plan has activity in past 3 months and will not be cancelled.

Name	Pet Name	Suspended Date	Last Memo Date	A/R Balance	Contract Balance	Last Payment Date	Last Payment	Pending Payment	
Heather Scott	Gunner	Apr 28, 23	Jun 28, 23 *	\$101.00	\$76.00	Mar 16, 23	\$38.00		Action ▼
Monica Merrill	Beans	Apr 28, 23	Jun 19, 23 *	\$355.00	\$594.00	Feb 16, 23	\$66.00		Action ▼

## YOUR Payment Issues

These are payment issues that have already been through VCP's collections process and have now been sent to the clinic for the clinic to collect. The VCP collections process begins after the first missed payment on the 15th and ends on or around the 22nd of the month.

Before A plan is transferred to the clinic as "YOUR Payment Issue" there is A \$25 late fee, this fee can potentially be avoided IF you SUSPEND the plan before the 20th of the month.

Suspending the plan will prompt VCP to cease all collections activities. By doing so, they will assume that you are taking responsibility for handling collections moving forward.



## Plans Up For Renewal & Plans Up For Auto-Renewal

### Plans up for Auto Renewal

This is A list of plans that are just that, plans that have been set to auto-renew. This is located under the operations tab.

Auto Renew List											
Account#	Name	Billing Status	Plan	Plan Pet Amount	Pet Name	Auto Renew	Renewal Plan	Renewal Plan Amount	Service Expiration Date	Final Payment Date	
315036	Brianna Vanzant	Paid-off	Canine Vital Plan*	\$624.00	Nala	On	Canine Vital Plan*	\$624.00	Aug 16, 2023	Jul 15, 2023	Renew
305665	Karen Feagins	Paid-off	Canine Vital Plan*	\$624.00	Petey	On	Canine Vital Plan*	\$624.00	Aug 08, 2023	Jul 15, 2023	Renew
305667	Lisa Reid	Paid-off	Canine Vital Plan*	\$624.00	Gypsy	On	Canine Vital Plan*	\$624.00	Aug 13, 2023	Jul 15, 2023	Renew
305668	Shannon Bouchet	Paid-off	Canine Vital Plan*	\$624.00	Buttons	On	Canine Vital Plan*	\$624.00	Aug 13, 2023	Jul 15, 2023	Renew
395975	Alba Melendez (Cruz Melendez)	Paid-off	Canine Premium Plan*	\$792.00	Oso	On	Canine Premium Plan*	\$792.00	Aug 24, 2023	Jul 15, 2023	Renew
396457	Claudia Moreno	Paid-off	Canine Vital Plan*	\$624.00	Chase	On	Canine Vital Plan*	\$624.00	Aug 30, 2023	Jul 15, 2023	Renew
394649	Sheila Martinez	Paid-off	Canine Premium Plan*	\$792.00	Bella	On	Canine Premium Plan*	\$792.00	Aug 08, 2023	Jul 15, 2023	Renew
395981	Preston Schulze	Paid-off	Canine Vital Plan*	\$624.00	Hera	On	Canine Vital Plan*	\$624.00	Aug 24, 2023	Jul 15, 2023	Renew
395732	Lauren Lee	Paid-off	Canine Core Plan*	\$456.00	Annabel	On	Canine Core Plan**	\$456.00	Aug 21, 2023	Jul 15, 2023	Renew
395982	Preston Schulze	Paid-off	Canine Vital Plan*	\$624.00	Chunk	On	Canine Vital Plan*	\$624.00	Aug 24, 2023	Jul 15, 2023	Renew









### Plans Up For Renewal

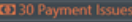

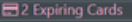
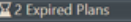
Located under the operations tab as well, this list gives you more options to sort through plans that are up for renewal. You can run A report for months out, it is recommended to run this report for three months out. Doing this gives you the ability to reach out to the pet parent to schedule A visit discuss the current plan and any changes.

The renewal list is an excellent tool to use to fill any gaps in the schedule, this can help increase clinic volume.

## Expiring Credit Cards

The expiring credit cards report is located under the reports tab, this report too can be run for any time frame.

 Home  Operations  Plans  Reports  Settings  Profile  Support  Logout

 30 Payment Issues  8 Expired Cards  2 Expiring Cards  2 Expired Plans

Expiring Credit Cards

Expire in months:

Include Expired Cards: ☐

Report Type: ☒ PDF ☐ Microsoft Excel

Run Report

Once you have exported the report you can see all of the plans that are up for renewal, including if the plan is scheduled to auto renew or not. In addition, this report provides the contact number for the pet parent as well making it easy to reach out to them.

	A	B	C	D	E	F	G	H	I	J
1	Account#	Name	Plan	Plan Status	Auto Renew	Primary Phone	Account Nbr	Card Type	Expiry Month	Expiry Year
2	305526	Bree Alban - Carbon	Feline Core Plan*	Ongoing	Yes	9047591458	0684	VI	8	2023
3	305548	Bree Alban - Gracie	Canine Vital Plan*	Cancelled	Yes	9047591458	0684	VI	8	2023
4	305649	Norma Manley - Missy	Canine Premium Plan	Cancelled		9046808010	8575	VI	8	2023
5	305570	Bree Alban - Layla	Canine Vital Plan*	Cancelled	Yes	9047591458	0684	VI	8	2023
6	296737	Marcos Fulinara - Madison	Canine Vital Plan	Cancelled	Yes	9047428317	8550	VI	8	2023
7	305662	Linda Barquist - Reagan	Canine Vital Plan	Cancelled	Yes	9046163325	1001	AM	8	2023
8	381292	Kelsey Morgan - Barrett	Canine Premium Plan*	Ongoing	Yes	9045534479	5986	VI	8	2023
9	305605	Bree Alban - Rue	Feline Premium Plan*	Cancelled	Yes	9047591458	0684	VI	8	2023
10	305708	Bree Alban - Enzo	Canine Vital Plan	Cancelled	Yes	9047591458	0684	VI	8	2023
11	305545	Kelsey Morgan - Barrett	Canine Vital Plan*	Cancelled	Yes	9045534479	5986	VI	8	2023
12	297701	Christopher Myers - Sabrina	Canine Premium Plan*	Cancelled	Yes	9044248098	5980	VI	9	2023
13	305658	Shelly Perry - Maclin - Legend	Canine Core Plan	Cancelled	Yes	9014179411	1082	MC	9	2023
14	305569	Chris Milligan - Jack Jack	Canine Vital Plan*	Cancelled		9855022253	7384	VI	9	2023
15	305607	Chris Milligan - Nola	Canine Premium Plan*	Cancelled	Yes	9855022253	7384	VI	9	2023
16	305516	Megan Stewart - Laika	Canine Vital Plan (Legacy)	Paid-off		7033286083	6527	VI	9	2023
17	388638	Sydney Fisher - Clover	Canine Vital Plan*	Cancelled	Yes	3607261596	3123	MC	9	2023
18	401077	Amanda Batten - Frosty	Feline Vital Plan*	Suspended	Yes	9123817313	9921	MC	9	2023
19	388636	Sydney Fisher - Misha	Feline Vital Plan*	Cancelled	Yes	3607261596	3123	MC	9	2023
20	556817	Christopher Hartman - Zig Zags	Feline Vital Plan*	Ongoing	Yes	9372329855	5352	MC	9	2023
21	283734	Cassidy Clinger - Rodger	Canine Premium Plan	Cancelled	Yes	8635147060	8937	VI	9	2023
22	402133	Jenifer Menendez - Ray	Canine Vital Plan*	Cancelled	Yes	9045758124	5916	MC	9	2023
23	284855	Amanda Batten - Kosmo	Canine Premium Plan*	Cancelled	Yes	9123817313	9921	MC	9	2023
24	312775	Amanda Batten - Khloe	Canine Premium Plan	Cancelled	Yes	9123817313	9921	MC	9	2023
25	305699	Raye Dopson - Chewie	Canine Core Plan*	Ongoing	Yes	9045488901	9000	VI	9	2023
26	305599	Adrienne Thompson - Holly	Canine Vital Plan*	Ongoing	Yes	9049932245	7980	VI	10	2023
27	366532	Melissa Seabaugh - Winston	Canine Premium Plan*	Paid-off		9042632155	5637	VI	10	2023
28	305591	Mackenzie Marchy - Nellie	Canine Vital Plan*	Ongoing	Yes	9042944171	6750	DC	10	2023
29	364703	Melissa Seabaugh - Rolla Jean	Canine Premium Plan*	Paid-off		9047632155	5637	VI	10	2023

## Performance Extract Report

The performance extract report is located on the reseller level, and has A few different options to run the report.

The screenshot shows the 'Reports' dropdown menu open. The menu items are: Statements, Portfolio Info, Expiring Credit Cards, Incentive/Production Pay, Service Revenue, Wellness Performance Report, Payments, Period End Report, Optional Services Report, Plan Pricing Report, Customer Data Download, Performance Extract Report, Cancellation Report, Merchant Users Report, and Pet Cancellation Analysis Report. The 'Performance Extract Report' is highlighted. Below the menu, a table of accounts is visible, including Greenville, Jacksonville Airport Clinic, Lake Buena Vista, Lake Nona, Lake Norman, Lakewood Ranch, Matthews, Mooresville, Oakleaf, Odessa, Peachtree, Sanford, and Snellville. The table also includes account numbers and a search bar.

Account#	Account Name	Search
181634	Greenville	<input type="text"/>
273059	Jacksonville Airport Clinic	<input type="text"/>
545780	Lake Buena Vista	<input type="text"/>
376692	Lake Nona	<input type="text"/>
203553	Lake Norman	<input type="text"/>
134136	Lakewood Ranch	<input type="text"/>
139176	Matthews	<input type="text"/>
203632	Mooresville	<input type="text"/>
140784	Oakleaf	<input type="text"/>
436534	Odessa	<input type="text"/>
550264	Peachtree	<input type="text"/>
203633	Sanford	<input type="text"/>
274656	Snellville	<input type="text"/>
273061	NewDay Veterinary Care - University Blvd Clinic	<input type="text"/>
273064	NewDay Veterinary Care - Winter Garden Clinic	<input type="text"/>
225652	NewDay Veterinary Care - World Golf Village	<input type="text"/>

The screenshot shows the 'Performance Extract Report' form. It includes a 'Period Type' section with radio buttons for Weekly, Monthly (selected), and Yearly. A 'Month' dropdown menu is set to '2023-08'. A 'Report Type' section has radio buttons for Microsoft Excel (selected) and CSV. An 'Export Report' button is at the bottom.

Period Type: ☐ Weekly ☒ Monthly ☐ Yearly

Month:

Report Type: ☒ Microsoft Excel ☐ CSV

Once you have run the report you will see data for all NewDay locations and A secondary list of employee plans.

Here you can see the two, say well as the beginning of the period plans.

Location	Location Accounting ID	Contract Sign Date	Launch Date	Coach	Period Start Date	Period End Date	Period Start Active Plans	Period New Plans
Employee Plans - Matthews	Matthews	Mar 06, 2020	Feb 01, 2022	Charles Moore	Aug 01, 2023	Aug 31, 2023	0	0
Employee Plans - Charlotte	Charlotte	May 06, 2021	Nov 23, 2021	Charles Moore	Aug 01, 2023	Aug 31, 2023	1	0
Employee Plans - Coconut Creek	Coconut Creek	Oct 27, 2020	Mar 11, 2021	Charles Moore	Aug 01, 2023	Aug 31, 2023	0	0
Employee Plans - Greenville	Greenville	Mar 10, 2021	Feb 01, 2022	Charles Moore	Aug 01, 2023	Aug 31, 2023	1	0
Employee Plans - Lakewood Ranch	Lakewood Ranch	Mar 06, 2020	Jul 20, 2021	Charles Moore	Aug 01, 2023	Aug 31, 2023	7	0
Employee Plans - Oakleaf	Oakleaf	Mar 10, 2021	Aug 26, 2021	Charles Moore	Aug 01, 2023	Aug 31, 2023	9	0
Employee Plans - Ft. Myers	Ft Myers	Oct 27, 2020	Mar 03, 2021	Charles Moore	Aug 01, 2023	Aug 31, 2023	3	0
Employee Plans - Ballantyne	Ballantyne	Mar 06, 2020	Feb 01, 2022	Charles Moore	Aug 01, 2023	Aug 31, 2023	1	0
Employee Plans - Georgetown	Georgetown	May 06, 2021	Jul 03, 2021	Charles Moore	Aug 01, 2023	Aug 31, 2023	5	0
Employee Plans - Bonita Springs	Bonita Springs	May 06, 2021	Sep 20, 2021	Charles Moore	Aug 01, 2023	Aug 31, 2023	4	0
Employee Plans - World Golf Village	World Golf	Mar 06, 2020	Feb 13, 2021	Charles Moore	Aug 01, 2023	Aug 31, 2023	15	0
NewDay Veterinary Care - Odessa	Odessa	Jan 06, 2023	Jan 24, 2023	Charles Moore	Aug 01, 2023	Aug 31, 2023	112	1
NewDay Veterinary Care - Lake Buena Vista		Apr 20, 2023	May 17, 2023	Charles Moore	Aug 01, 2023	Aug 31, 2023	39	2
NewDay Veterinary Care - Birmingham		May 24, 2023		Charles Moore	Aug 01, 2023	Aug 31, 2023	0	0
NewDay Veterinary Care - Peachtree		May 24, 2023	Jun 21, 2023	Charles Moore	Aug 01, 2023	Aug 31, 2023	18	1
NewDay Veterinary Care - Lakewood Ranch	Lakewood Ranch	Aug 29, 2019	Sep 25, 2019	Charles Moore	Aug 01, 2023	Aug 31, 2023	384	0
NewDay Veterinary Care - Matthews	Matthews	Nov 14, 2019	Dec 14, 2019	Charles Moore	Aug 01, 2023	Aug 31, 2023	182	0
NewDay Veterinary Care - Ballantyne	Ballantyne	Nov 14, 2019	Dec 18, 2019	Charles Moore	Aug 01, 2023	Aug 31, 2023	212	0
NewDay Veterinary Care - Gainesville	Gainesville	Dec 19, 2019	Jan 25, 2020	Charles Moore	Aug 01, 2023	Aug 31, 2023	240	0
NewDay Veterinary Care - Oakleaf	Oakleaf	Dec 19, 2019	Jan 03, 2020	Charles Moore	Aug 01, 2023	Aug 31, 2023	444	1
Employee Plans - Gainesville	Gainesville	Mar 06, 2020	Apr 27, 2021	Charles Moore	Aug 01, 2023	Aug 31, 2023	17	0
NewDay Veterinary Care - Coconut Creek	Coconut Creek	Jun 05, 2020	Jul 08, 2020	Charles Moore	Aug 01, 2023	Aug 31, 2023	462	0
NewDay Veterinary Care - Greenville	Greenville	Jul 01, 2020	Jul 01, 2020	Charles Moore	Aug 01, 2023	Aug 31, 2023	183	0
NewDay Veterinary Care - Ft. Myers	Ft Myers	Aug 31, 2020	Sep 14, 2020	Charles Moore	Aug 01, 2023	Aug 31, 2023	192	0
NewDay Veterinary Care - Georgetown	Georgetown	Nov 03, 2020	Nov 03, 2020	Charles Moore	Aug 01, 2023	Aug 31, 2023	202	0
NewDay Veterinary Care - Lake Norman	Lake Norman	Nov 06, 2020	Oct 06, 2021	Charles Moore	Aug 01, 2023	Aug 31, 2023	308	0
NewDay Veterinary Care - Mooresville	Mooresville	Nov 06, 2020	Oct 06, 2021	Charles Moore	Aug 01, 2023	Aug 31, 2023	54	0
NewDay Veterinary Care - Sanford	Sanford	Nov 06, 2020	May 19, 2021	Charles Moore	Aug 01, 2023	Aug 31, 2023	191	0
NewDay Veterinary Care - Charlotte	Charlotte	Nov 06, 2020	Nov 25, 2020	Charles Moore	Aug 01, 2023	Aug 31, 2023	134	1
NewDay Veterinary Care - World Golf Village	World Golf	Dec 22, 2020	Dec 23, 2020	Charles Moore	Aug 01, 2023	Aug 31, 2023	298	1

You can see in the second example there is much data in this report.

## New Plans Canceled Plans Expired Plans



Period End Date	Period Start Active Plans	Period New Plans	Period Canceled Plans	Period Expired Plans	Period End Total Plans	Period New Plans Converted	Period Canceled Plans Less Than 30	Period Cancel
2 Aug 31, 2023	0	0	0	0	0	0	0	0
3 Aug 31, 2023	1	0	0	0	1	0	0	0
4 Aug 31, 2023	0	0	0	0	0	0	0	0
5 Aug 31, 2023	1	0	0	0	1	0	0	0
6 Aug 31, 2023	7	0	0	0	7	0	0	0
7 Aug 31, 2023	9	0	0	0	9	0	0	0
8 Aug 31, 2023	3	0	0	0	3	0	0	0
9 Aug 31, 2023	1	0	0	0	1	0	0	0
0 Aug 31, 2023	5	0	0	0	5	0	0	0
1 Aug 31, 2023	4	0	0	0	4	0	0	0
2 Aug 31, 2023	15	0	0	0	15	0	0	0
3 Aug 31, 2023	112	1	0	0	113	0	0	0
4 Aug 31, 2023	39	2	0	0	41	0	0	0
5 Aug 31, 2023	0	0	0	0	0	0	0	0
6 Aug 31, 2023	18	1	0	0	19	0	0	0
7 Aug 31, 2023	384	0	1	0	383	0	0	0
8 Aug 31, 2023	182	3	1	0	184	0	0	0
9 Aug 31, 2023	212	0	1	0	211	0	0	0
0 Aug 31, 2023	240	0	0	0	240	0	0	0
1 Aug 31, 2023	444	1	1	1	443	0	0	0
2 Aug 31, 2023	17	0	0	0	17	0	0	0
3 Aug 31, 2023	462	0	2	0	460	0	0	0
4 Aug 31, 2023	183	0	0	0	183	0	0	0
5 Aug 31, 2023	192	0	0	0	192	0	0	0
6 Aug 31, 2023	202	0	1	0	201	0	0	0
7 Aug 31, 2023	308	0	0	1	307	0	0	0
8 Aug 31, 2023	54	0	0	2	52	0	0	0
9 Aug 31, 2023	191	0	0	1	190	0	0	0
0 Aug 31, 2023	134	1	1	0	134	0	0	0
1 Aug 31, 2023	298	1	0	0	299	0	0	0

The performance extract report is where you can find your NET PLANS.



## Payments Reports

The payments report located under the reports tab, will show you all the payments processed within the time frame. This report will include the location, the plan information, billing date, payment type, total payment, enrollment fee, VCP fee, and plan payment.

Location ID	External Account	Location	Client ID	Client	Pet ID	Pet	Plan ID	Plan	Converted	Status	Billing Date	Billed Amt	Payment Date	Payment Method	Payment Option	Processed
260224	Bonita Springs	Employee Plans - Bonita Springs	4403IL	Isabella Lilly	4403CL	Cashew	1.001E+09	Resort No		New	Jul 27, 2023	\$91.20	Jul 27, 2023	CC	VI	System
437512	Fleming Island	Employee Plans - Fleming Island	25770	Melissa Dill	38045	Amiya	1.001E+09	Resort No		New	Jul 28, 2023	\$68.80	Jul 28, 2023	CC	VI	System
550257		Employee Plans - Lake Buena Vista	23250	Liz Leon Costale	31092	Mocha	1.001E+09	Resort No		Ongoi	Jul 24, 2023	\$30.40	Jul 24, 2023	CC	VI	System
550257		Employee Plans - Lake Buena Vista	28158	Shaliyah Gregg	37783	Benji	1.001E+09	Resort No		New	Jul 25, 2023	\$91.20	Jul 25, 2023	CC	MC	System
394687	Lake Nona	Employee Plans - Lake Nona	28158	Shaliyah Gregg	37783	Benji	1.001E+09	Resort No		Cance	Jul 25, 2023	\$91.20	Jul 25, 2023	CC	MC	System
394687	Lake Nona	Employee Plans - Lake Nona	28158	Shaliyah Gregg	37783	Benji	1.001E+09	Resort No		Cance	Jul 25, 2023	\$-91.20	Jul 25, 2023	CC	MC	System
263818	Sanford	Employee Plans - Sanford	32632-ND	Tyler Kersey	34553-ND	Aslan	1E+09	Resort No		Paid->	Jul 21, 2023	\$41.60	Jul 24, 2023	CC	VI	System
289073	University	Employee Plans - University Blvd Clinic	20006	Jamie Vitale	26459	Marina	1.001E+09	Resort No		Ongoi	Jul 21, 2023	\$52.80	Jul 26, 2023	CC	VI	System
289158	Winter Garden	Employee Plans - Winter Garden	10977	Joe Morales	14117	Chloe	1E+09	Resort No		Ongoi	Jul 21, 2023	\$52.80	Jul 24, 2023	CC	AM	System
289158	Winter Garden	Employee Plans - Winter Garden	10977	Joe Morales	14116	Luna	1E+09	Resort No		Ongoi	Jul 21, 2023	\$52.80	Jul 24, 2023	CC	AM	System
289158	Winter Garden	Employee Plans - Winter Garden	5006	Omariyls Gonzal	6310	Jerry	1E+09	Resort No		Ongoi	Jul 28, 2023	\$41.60	Jul 28, 2023	CC	MC	System
289158	Winter Garden	Employee Plans - Winter Garden	18156	Debra Calabro	30719	Luna	1E+09	Resort No		Ongoi	Jul 28, 2023	\$52.80	Jul 28, 2023	CC	MC	System
a862163e-01	Amelia	NewDay Veterinary Care - Amelia	20836	Vaman Patel	27625	Rex	1E+09	Canine No		Ongoi	Jul 24, 2023	\$63.00	Jul 24, 2023	CC	VI	System
a862163e-01	Amelia	NewDay Veterinary Care - Amelia	19522	Giana Esposito	25792	Jackson	1E+09	Canine No		Suspe	Jul 25, 2023	\$91.00	Jul 25, 2023	CC	VI	System
a862163e-01	Amelia	NewDay Veterinary Care - Amelia	20084	Paige Macbeth	26564	Daisy aka	1.001E+09	Canine No		Ongoi	Jul 25, 2023	\$91.00	Jul 25, 2023	CC	VI	System
a862163e-01	Amelia	NewDay Veterinary Care - Amelia	26512	James Baker	35576	Bluey	1.001E+09	Canine No		Ongoi	Jul 25, 2023	\$91.00	Jul 25, 2023	CC	MC	System
a862163e-01	Amelia	NewDay Veterinary Care - Amelia	7142	Paige DiGiorgi	37680	Doug	1.001E+09	Canine No		New	Jul 28, 2023	\$100.00	Jul 28, 2023	CC	VI	System
a862163e-01	Amelia	NewDay Veterinary Care - Amelia	23785	Masami Rising	31813	Jack	1E+09	Canine No		Suspe	Jul 29, 2023	\$91.00	Jul 29, 2023	CC	VI	System
afcb82db-b0	Ballantyne	NewDay Veterinary Care - Ballantyne	2209-ND	Rick Swarts	65282-ND	Samantha	1.001E+09	Canine No		New	Jul 24, 2023	\$114.00	Jul 24, 2023	CC	VI	System
afcb82db-b0	Ballantyne	NewDay Veterinary Care - Ballantyne	56450-ND	Kayla Stallworth	65270-ND	Roman	1.001E+09	Canine No		New	Jul 24, 2023	\$100.00	Jul 24, 2023	CC	MC	System
afcb82db-b0	Ballantyne	NewDay Veterinary Care - Ballantyne	50377-ND	Angela Morrison	57152-ND	Turtle	1E+09	Canine No		Ongoi	Jul 14, 2023	\$66.00	Jul 30, 2023	CC	MC	System
afcb82db-b0	Ballantyne	NewDay Veterinary Care - Ballantyne	50377-ND	Angela Morrison	57153-ND	Tootsie	1E+09	Canine No		Ongoi	Jul 14, 2023	\$66.00	Jul 30, 2023	CC	MC	System
79bc28b1-5	Bonita Springs	NewDay Veterinary Care - Bonita Spring	43920-ND	Ryan Roelle	48841-ND	Bailey	1E+09	Canine No		Ongoi	Jul 24, 2023	\$91.00	Jul 24, 2023	CC	VI	System
79bc28b1-5	Bonita Springs	NewDay Veterinary Care - Bonita Spring	33466-ND	Sergio Bartarolo	35607-ND	Lucy	1E+09	Canine No		Ongoi	Jul 24, 2023	\$63.00	Jul 24, 2023	CC	AM	System
79bc28b1-5	Bonita Springs	NewDay Veterinary Care - Bonita Spring	33466-ND	Sergio Bartarolo	35625-ND	Roro	1E+09	Canine No		Ongoi	Jul 24, 2023	\$63.00	Jul 24, 2023	CC	AM	System
79bc28b1-5	Bonita Springs	NewDay Veterinary Care - Bonita Spring	27385-ND	Natalie Pinto	27976-ND	Kyla	1.001E+09	Canine No		New	Jul 24, 2023	\$114.00	Jul 24, 2023	CC	AM	System
79bc28b1-5	Bonita Springs	NewDay Veterinary Care - Bonita Spring	4994BS	Bianca Swidwa	4994MS	Margo	1.001E+09	Canine No		New	Jul 27, 2023	\$100.00	Jul 27, 2023	CC	VI	System
79bc28b1-5	Bonita Springs	NewDay Veterinary Care - Bonita Spring	43111-ND	Amanda Holland	47793-ND	Dante	1E+09	Canine No		Ongoi	Jul 14, 2023	\$38.00	Jul 30, 2023	CC	VI	System

an ID	Plan	Converted	Status	Billing Date	Billed Amt	Payment Date	Payment Method	Payment Option	Processed By	Total Payment	Enrollment Fee	VCP Fee	Plan Payment	Settled Amount
01E+09	Resort No	New	Jul 27, 2023	\$91.20	Jul 27, 2023	CC	VI	System		\$91.20	\$38.40	\$0.00	\$52.80	\$91.20
01E+09	Resort No	New	Jul 28, 2023	\$68.80	Jul 28, 2023	CC	VI	System		\$68.80	\$38.40	\$0.00	\$30.40	\$68.80
01E+09	Resort No	Ongoi	Jul 24, 2023	\$30.40	Jul 24, 2023	CC	VI	System		\$30.40	\$0.00	\$0.00	\$30.40	\$30.40
01E+09	Resort No	New	Jul 25, 2023	\$91.20	Jul 25, 2023	CC	MC	System		\$91.20	\$38.40	\$0.00	\$52.80	\$91.20
01E+09	Resort No	Cance	Jul 25, 2023	\$91.20	Jul 25, 2023	CC	MC	System		\$91.20	\$38.40	\$0.00	\$52.80	\$91.20
01E+09	Resort No	Cance	Jul 25, 2023	\$-91.20	Jul 25, 2023	CC	MC	System		\$-91.20	\$-38.40	\$0.00	\$-52.80	\$-91.20
+09	Resort No	Paid-<	Jul 21, 2023	\$41.60	Jul 24, 2023	CC	VI	System		\$41.60	\$0.00	\$0.00	\$41.60	\$41.60
01E+09	Resort No	Ongoi	Jul 21, 2023	\$52.80	Jul 26, 2023	CC	VI	System		\$52.80	\$0.00	\$0.00	\$52.80	\$52.80
+09	Resort No	Ongoi	Jul 21, 2023	\$52.80	Jul 24, 2023	CC	AM	System		\$52.80	\$0.00	\$0.00	\$52.80	\$52.80
+09	Resort No	Ongoi	Jul 21, 2023	\$52.80	Jul 24, 2023	CC	AM	System		\$52.80	\$0.00	\$0.00	\$52.80	\$52.80
+09	Resort No	Ongoi	Jul 28, 2023	\$41.60	Jul 28, 2023	CC	MC	System		\$41.60	\$0.00	\$0.00	\$41.60	\$41.60
+09	Resort No	Ongoi	Jul 28, 2023	\$52.80	Jul 28, 2023	CC	MC	System		\$52.80	\$0.00	\$0.00	\$52.80	\$52.80
+09	Canine No	Ongoi	Jul 24, 2023	\$63.00	Jul 24, 2023	CC	VI	System		\$63.00	\$0.00	\$25.00	\$38.00	\$63.00
+09	Canine No	Suspe	Jul 25, 2023	\$91.00	Jul 25, 2023	CC	VI	System		\$91.00	\$0.00	\$25.00	\$66.00	\$91.00
01E+09	Canine No	Ongoi	Jul 25, 2023	\$91.00	Jul 25, 2023	CC	VI	System		\$91.00	\$0.00	\$25.00	\$66.00	\$91.00
01E+09	Canine No	Ongoi	Jul 25, 2023	\$91.00	Jul 25, 2023	CC	MC	System		\$91.00	\$0.00	\$25.00	\$66.00	\$91.00
01E+09	Canine No	New	Jul 28, 2023	\$100.00	Jul 28, 2023	CC	VI	System		\$100.00	\$48.00	\$0.00	\$52.00	\$100.00
+09	Canine No	Suspe	Jul 29, 2023	\$91.00	Jul 29, 2023	CC	VI	System		\$91.00	\$0.00	\$25.00	\$66.00	\$91.00
01E+09	Canine No	New	Jul 24, 2023	\$114.00	Jul 24, 2023	CC	VI	System		\$114.00	\$48.00	\$0.00	\$66.00	\$114.00
01E+09	Canine No	New	Jul 24, 2023	\$100.00	Jul 24, 2023	CC	MC	System		\$100.00	\$48.00	\$0.00	\$52.00	\$100.00
+09	Canine No	Ongoi	Jul 14, 2023	\$66.00	Jul 30, 2023	CC	MC	System		\$66.00	\$0.00	\$0.00	\$66.00	\$66.00
+09	Canine No	Ongoi	Jul 14, 2023	\$66.00	Jul 30, 2023	CC	MC	System		\$66.00	\$0.00	\$0.00	\$66.00	\$66.00
+09	Canine No	Ongoi	Jul 24, 2023	\$91.00	Jul 24, 2023	CC	VI	System		\$91.00	\$0.00	\$25.00	\$66.00	\$91.00
+09	Canine No	Ongoi	Jul 24, 2023	\$63.00	Jul 24, 2023	CC	AM	System		\$63.00	\$0.00	\$25.00	\$38.00	\$63.00
+09	Canine No	Ongoi	Jul 24, 2023	\$63.00	Jul 24, 2023	CC	AM	System		\$63.00	\$0.00	\$25.00	\$38.00	\$63.00
01E+09	Canine No	New	Jul 24, 2023	\$114.00	Jul 24, 2023	CC	AM	System		\$114.00	\$48.00	\$0.00	\$66.00	\$114.00
01E+09	Canine No	New	Jul 27, 2023	\$100.00	Jul 27, 2023	CC	VI	System		\$100.00	\$48.00	\$0.00	\$52.00	\$100.00
+09	Canine No	Ongoi	Jul 14, 2023	\$38.00	Jul 30, 2023	CC	VI	System		\$38.00	\$0.00	\$0.00	\$38.00	\$38.00

## Customer Data Download

The customer data download is exceptionally handy when contacting the masses is necessary, you can find addresses, emails, and contact numbers.

**Customer Data Download**

Customer Name:

Plan Name:

Search

Customize Report:

☐ Address ☐ Email ☐ Phone ☐ Pet & Plan Name ☐

Export

Customer Name	Pet Name	Plan Name	Address Line 1	City	State	Zip	Email	Primary Phone	Alternative Phone
Debbie Ulmer	Josie	Canine Vital Wellness 2021*	2011 Crystal Lake Trail	Lakewood Ranch	FL	34211	debbieu17@yaoo.com	3144439129	
Scott Sutton	Jasper	Canine Premium Wellness 2021**	605 Firebusch Court	Bradenton	FL	34212	scottsutton88@gmail.com	3175130478	
Lori Jones	Shiba	Vital Wellness Plan- Canine	315 111th St E	Bradenton	FL	34212	lorij111@hotmail.com	9417303480	
Vincent Onesti	Zelda	Vital Wellness Plan- Canine	11223 White Rock Terrace	Bradenton	FL	34211	onestivincent@yahoo.com	9415490092	
Christina Sexton	Bianca	Core Wellness Plan- Canine	6424 44th Ave East	Bradenton	FL	34203	christina.sexton@hotmail.com	9415279063	
Klarence Roebuck	Marley	Premium Wellness Plan- Canine	3308 22nd Ave West	Bradenton	FL	34205	Kroebuck123@gmail.com	4079147211	
Angel Bulacan	Mindy	Premium Wellness Plan- Feline	5457 1st Ave E	Bradenton	FL	34208	mua.angelb@gmail.com	9417259610	
Brenda Medina	Ella	Vital Wellness Plan- Canine	16521 Myrtle Sand Drive	Wimauma	FL	33598	bremed_bremed@yahoo.com	9419628877	8139478456
Allison Patel	Hallie	Vital Wellness Plan- Canine	11531 Sweetgrass Drive	Bradenton	FL	34212	allison.patel27@gmail.com	7083695956	
Virginia Miranda	Luke	Canine Vital Wellness 2021**	7914 Grand Esturary Trail #102	Bradenton	FL	34212	mirandapgal@me.com	8322836318	7133927949

12345678910..1375>

## Consumption Errors

Service consumption errors have several error messages, however the most common error you will find is "Service professional not found".

## Service Consumption Errors

Status: ☒ Issue ☐ Dismissed ☐ Consumed ☐ Pending ☐ All

Client/Pet:

Error Message Filter:

From Date:

Thru Date:

Dismiss mode:

Reset

Export

Process Active Errors

Client	Pet	Client Cd	Member Cd	Service Cd	Service Description	Quantity	Service Professional	Service Date	Error Message	Last Updated	Action
Bethany Reynolds	Gracie	28477-ND	29328-ND	621	Skin Cytology	1	17910	Aug 02, 2023	SCE-1006: Service Professional not found....	Aug 03, 2023	Fix in the System   Dismiss
Bethany Reynolds	Gracie	28477-ND	29328-ND	EXAM0010	Physical Exam/Office Visit	1	17910	Aug 02, 2023	SCE-1006: Service Professional not found....	Aug 03, 2023	Fix in the System   Dismiss
Sandi Cline	Memphis	52240-ND	61165-ND	INLAB058	Intestinal Parasite Exam	1	18273	Aug 02, 2023	SCE-1006: Service Professional not found....	Aug 03, 2023	Fix in the System   Dismiss
Sandi Cline	Georgi	52240-ND	60397-ND	INLAB058	Intestinal Parasite Exam	1	18273	Aug 02, 2023	SCE-1006: Service Professional not found....	Aug 03, 2023	Fix in the System   Dismiss
Joanne Ocello	Luna Chanel	41080-ND	45234-ND	403	Urinalysis- In House	1	14307	Aug 01, 2023	SCE-1006: Service Professional not found....	Aug 02, 2023	Fix in the System   Dismiss

## Adding A new employee

To add a new employee click the setting tab and scroll down to the employee option. In the upper left corner click the new employee option. Then enter the employees information.

8 Consumption Issues

7 Payment Issues

5 Expiring Cards

5 Expired Cards

+ New Employee

### Employees

Tag:  Description:

First Name:  Last Name:

Employee Cd	Last Name	First Name	Title	Position	Activity Type	Email	Initial Commission	Service Commission	
VM	Manager	Vet	Veterinary Manager	Manager	Administration	lakewoodbranch@petparadisevet.com			Activity Log
vparker@petparadisevet.com	Parker	Vikki	Veterinarian	Doctor	Clinical	vparker@petparadisevet.com			Activity Log
MR	Roberts	Mark	Veterinarian	Doctor	Clinical				Activity Log
SE	Evancho	Sara	CVT	Tech	Administration	sevancho@petparadise.com			Activity Log
SC	Cowan	Shelley	VA	Tech	Administration	scowan@petparadise.com			Activity Log
KB	Ballard	Katelyn	VA	Tech	Administration				Activity Log
KP	Phaneuf	Kelsie		Tech	Administration				Activity Log
LT	Turner	Lisa		Tech	Administration	LTurner@petparadise.com			Activity Log



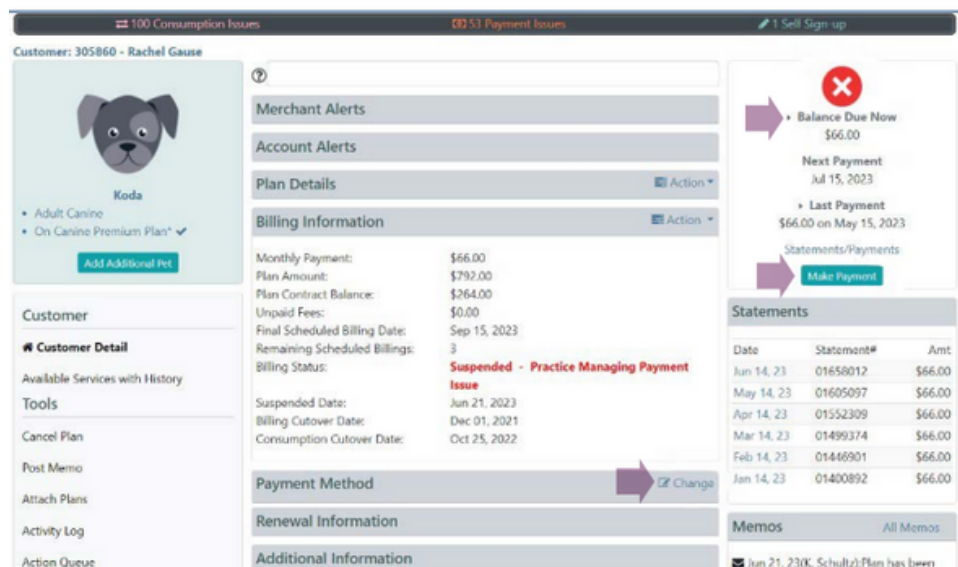
# 04

## Payments: When Is A Plan DOA? How Can We Revive It?

When clients who have A Care Plan have A missed payment or balance on that care plan, an indicator will appear in the Pulse system on the patient page. This red x indicator will appear both in the patient highlights and when the care plan tab is selected. If this status is encountered, it must be resolved prior to invoicing care plan or out of plan discounted services.

If the client wishes to resolve the payment issue, they must pay the 'Balance Due Now' shown in the account page. Enquire if the payment method will need to be updated, and if so, click the 'change' link to the right of the 'payment method' section of the account page. If the payment method is deemed viable, proceed to the 'make payment' button on the right of the account page.

### Making Payments



Customer: 305860 - Rachel Gause

**Koda**  
• Adult Canine  
• On Canine Premium Plan\* ✓  
[Add Additional Pet](#)

**Customer**  
# Customer Detail  
Available Services with History  
Tools  
Cancel Plan  
Post Memo  
Attach Plans  
Activity Log  
Action Queue

**Merchant Alerts**

**Account Alerts**

**Plan Details** [Action](#)

**Billing Information** [Action](#)

Monthly Payment: \$66.00  
Plan Amount: \$792.00  
Plan Contract Balance: \$264.00  
Unpaid Fees: \$0.00  
Final Scheduled Billing Date: Sep 15, 2023  
Remaining Scheduled Billings: 3  
Billing Status: **Suspended - Practice Managing Payment Issue**  
Suspended Date: Jun 21, 2023  
Billing Cutover Date: Dec 01, 2021  
Consumption Cutover Date: Oct 25, 2022

**Payment Method** [Change](#)

**Renewal Information**

**Additional Information**

**Balance Due Now**  
\$66.00  
Next Payment: Jul 15, 2023  
Last Payment: \$66.00 on May 15, 2023  
[Make Payment](#)

**Statements**

Date	Statement#	Amt
Jun 14, 23	01658012	\$66.00
May 14, 23	01605097	\$66.00
Apr 14, 23	01552309	\$66.00
Mar 14, 23	01499374	\$66.00
Feb 14, 23	01446901	\$66.00
Jan 14, 23	01400892	\$66.00

**Memos** [All Memos](#)  
Jun 21, 23(K. Schultz): Plan has been

Determine if the client wishes to resolve the balance via the card on file in the Care Plans System or via an alternate method. Collecting the payment from the card on file is preferred. To do this, simply select the card on file option, select the 'apply to balance due' (or pay-off if the client wishes), confirm the payment amount, confirm effective date/debit date, and click continue.

Customer: 548743 - gill mill - Tux

**Make Manual Payment - Wellness Plan**

**How should the payment be collected?**

Collect the Payment via Master Card On File ☐

Already collected the payment ☐

Send Posting EMail ☐

**How should the payment be applied?**

Apply to balance due \$96.00 ☐

Pay-off Wellness Plan \$960.00 ☐

**Continue**

**Payment Summary:**

- Balance Due Now: \$96.00
- Next Payment: Aug 12, 2023
- Last Payment: \$96.00 on Jun 13, 2023

**Statements/Payments:**

**Memos:** All Memos

Jul 10, 23(C. Moore)-Pending Payment Stopped.

If the client opts for an alternate payment method, you will collect the balance due via the at practice payment terminal. Once the payment is ensured, you will post the payment by selecting the 'Already collected the payment' option and proceeding as in the above instructions. An additional 'Post Payment' page will appear allowing you to add the payment type, statement number (if desired), and any comments related to the payment. Click the post payment button to continue. \*\*If you do not post Care Plan payments collected at practice in the Care Plan System, the balance will persist as if no payment was collected\*\*

Customer: 548743 - gill mill - Tux

**Post Payment**

Payment Purpose: **Apply to balance due**

Payment Date: **Jul 10, 2023**

Payment Type: **Cash**

Statement Number: **On Account**

Comments:

Payment Amt: **\$96.00**

**Post Payment**

Once the payment is resolved, the 'Balance Due Now' will show as \$0. If the red indicator has changed to a green check, you may proceed with performing Care Plan services. You can review and confirm payments via the 'Statements and Payments' link above the make payment button. You can also review the next payment date with the client if desired.

Customer: 548743 - gill mill

• Your payment was posted successfully

Balance Due Now: \$0.00

Next Payment: Aug 12, 2023

Last Payment: \$96.00 on Jul 10, 2023

Statements/Payments

Make Payment

Plan Details

Merchant: VCP Training Practice (Test)

Name: gill mill

Customer Since: May 12, 2023

Plan ID: 1000635312

Account#: 548743

Wellness Plan: Canine Enhanced Wellness

PIMS Client ID: d5d5d6

PIMS Patient ID: fsgdlg7h

Current Services Start on: May 12, 2023

Customer Detail

Customer: Tux

- Adult Male Canine
- French Bulldog
- On Canine Enhanced Wellness ✓
- On Puppy Healthy Start

Add Additional Pet

Statements

Date	Statement#	Amt
Jul 07, 23	01706308	\$96.00
Jun 07, 23	01653668	\$96.00

If the red indicator is still present but the Balance Due Now' is \$0, then an additional step is required to resume automated payments. This occurs because the Care Plan has been suspended due to the balance and needs to be reinstated. To do this, click the action drop down to the right of the 'Billing Information' section and select 'Reinstate'. This will resolve the red indicator to green and the client can proceed with use of their Care Plan.

Customer: 356153 - Long Nghiem

• Your payment was posted successfully

Balance Due Now: \$0.00

Next Payment: Jul 15, 2023

Last Payment: \$127.10 on Jul 10, 2023

Statements/Payments

Make Payment

Billing Information

Monthly Payment: \$37.13

Plan Amount: \$409.88

Plan Contract Balance: \$222.80

Unpaid Fees: \$0.00

Final Scheduled Billing Date: Dec 15, 2023

Remaining Scheduled Billings: 6

Billing Status: **Suspended - Practice Managing Pa Issue**

Suspended Date: Jun 27, 2023

Billing Cutover Date: May 01, 2022

Consumption Cutover Date: Jan 19, 2023

Payment Action

- Make Payment
- Change Payment Date
- Post Chargeback
- Refund Payment
- Update Suspend Status
- Reinstate

Customer Detail

Customer: Mia

- Adult Feline
- On Feline Complete Care Plan ✓
- On Secondary Test Plan

Pet Family

- JayJay On Canine Total Wellness (Cancelled)
- VCP Test On Puppy Healthy Start (Cancelled)

Add Additional Pet

Payment Method

Change

Memos

All Memos

Jun 27, 23(M. Ortiz):Plan has been

Home
 Operations
 Plans
 Reports
 Settings
 Profile
 Support
 Filters
Logout

**Mia**

- Adult Feline
- On Feline Complete Care Plan ✓
- On Secondary Test Plan

**Pet Family**

- Jayjay On Canine Total Wellness (Cancelled)
- VCP Test On Puppy Healthy Start (Cancelled)

Add Additional Pet

Customer: 356153 - Long Nghiem - Mia

**Reinstate**

Amount/Term: \$409.88 12 Months

Remaining Plan Amount: \$222.80

Current Sub-Status: Practice Managing Payment Issue

Message:

Reinstate

**Pending Payments:** At the start of the payment cycle, several days ahead of the scheduled payment date, A pending payments window will appear on the right side of the clients account page in the Care Plan System. This can impact the ability to collect manual payments or cancel A plan. This is because the Care Plan system is anticipated to collect an automated payment and is A safeguard to prevent unanticipated double payment and, in the case of cancellation, improper calculation of the ‘proposed settlement amount’.

20 Self Sign-ups
 3 New Applications
 001 Payment Issue
 1 Expired Card

**Tux**

- Adult Male Canine
- French Bulldog
- On Canine Enhanced Wellness ✓
- On Puppy Healthy Start

Add Additional Pet

Customer: 548743 - gill mill

**Merchant Alerts**

- VCP provides wellness payment issue support. Merchant provides wellness expiring card support.

**Plan Details**

Merchant: VCP Training Practice (test)

Name: gill mill

Customer Since: May 12, 2023

Plan ID: 1000635312

Account#: 548743

Wellness Plan: Canine Enhanced Wellness

PIMS Client ID: dflsds6

PIMS Patient ID: fgdfig7h

Current Services Start on: May 12, 2023

Current Services Expire on: May 11, 2024

Plan Status: Active

**Billing Information**

Monthly Payment: \$96.00

Plan Amount: \$1,152.00

Plan Contract Balance: \$960.00

Balance Due Now \$96.00

Next Payment: Aug 12, 2023

Last Payment \$96.00 on Jun 13, 2023

Statements/Payments

Make Payment

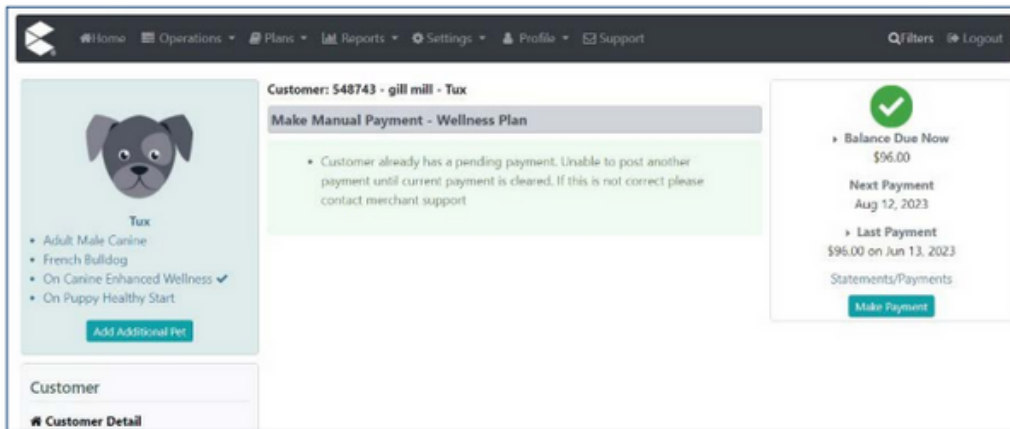
**Pending Payments**

Jul 12, 23 \$96.00 Planned Change

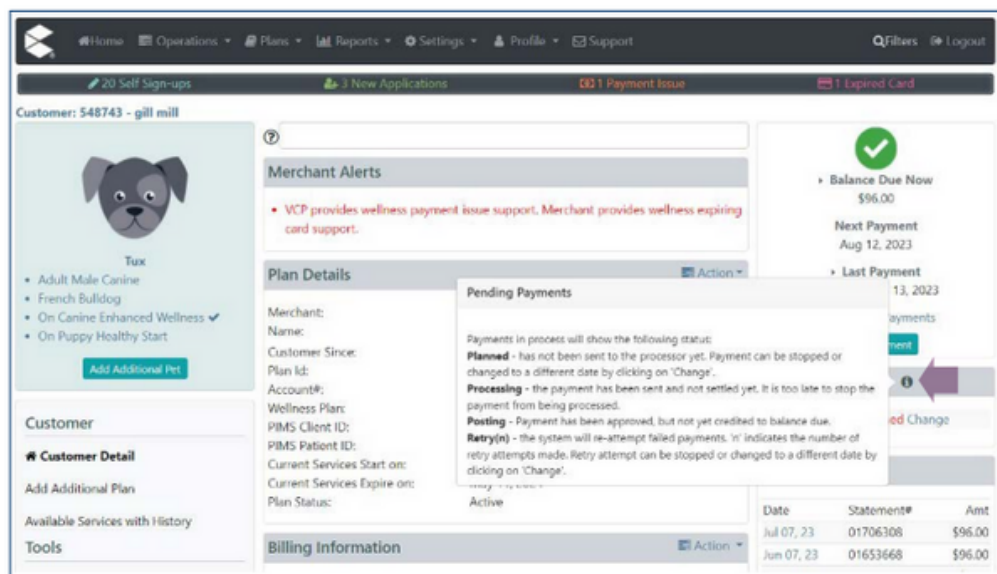
**Statements**

Date	Statement#	Amt
Jul 07, 23	01706308	\$96.00
Jun 07, 23	01653668	\$96.00
May 12, 23	50001122	\$0.00

If you attempt either while there is a pending payment you will receive the following message.



During certain stages of the payment cycle, these pending automated payments can be stopped so that you can make A manual payment or cancel the plan. To determine if stopping the payment is possible please check the pending payment status via the help indicator.



If you wish to stop the automated payment during the 'planned' payment stage, simply click the 'change' link in the pending payment window and select 'stop' payment, make any notes needed, and click the 'process' button.

The screenshot shows a web application interface for pet management. At the top is a navigation bar with links: Home, Operations, Plans, Reports, Settings, Profile, and Support. On the right of the navigation bar are 'Q Filters' and 'Logout'. The main content area is divided into several sections. On the left, there is a pet profile for 'Tux', an Adult Male Canine, French Bulldog, with a list of services: 'On Canine Enhanced Wellness' (checked) and 'On Puppy Healthy Start'. Below this is a button 'Add Additional Pet'. In the center, the 'Pending Payment' section shows the customer ID '548743 - gill mill - Tux'. It has a 'Type:' dropdown with 'Stop Payment' selected (indicated by a purple arrow) and 'Change Date' as an option. Below this, it shows 'Current Payment Date: Jul 12, 2023' and 'Payment Amt: \$96.00'. There is a 'Notes:' field with a text area. At the bottom of this section is a 'Process' button (indicated by a purple arrow). On the right, a summary box shows a green checkmark, 'Balance Due Now \$96.00', 'Next Payment Aug 12, 2023', and 'Last Payment \$96.00 on Jun 13, 2023'. It also has a 'Make Payment' button.

By stopping the automated payment you are indicating that the balance will be resolved manually or that the plan is to be cancelled. The change date option is not viable as there is only one allowed payment date.

**Manual Plan Suspension:** There may be some scenarios where you have communicated with A client and they anticipate the automated payment will fail and they are unable to resolve the balance ahead of their scheduled payment date. Under these circumstances you may opt to allow the client to manually resolve their balance at A later date. If you choose to offer this option the best practice is to stop any pending payments (if needed) and manually suspend the plan to prevent any automated payments until the balance can be resolved. Once the balance is manually resolved you would then reinstate the plan as mentioned above to resume recurring automated payments.



**Merchant Alerts**

**Plan Details**

Merchant: VCP Training Practice (Test)  
 Name: **Marti Harris**  
 Customer Since: Mar 20, 2023  
 Plan Id: 1000621346  
 Account#: 537132  
 Wellness Plan: Canine Complete Care Plan  
 PIMS Client ID: 111  
 PIMS Patient ID: 222  
 Current Services Start on: Mar 20, 2023  
 Current Services Expire on: Mar 19, 2024  
 Plan Status: Active

**Billing Information**

Monthly Payment: \$35.99  
 Plan Amount: \$431.88  
 Plan Contract Balance: \$287.92  
 Unpaid Fees: \$0.00  
 Final Scheduled Billing Date: Feb 20, 2024  
 Remaining Scheduled Billings: 8  
 Billing Status: Ongoing

**Payment Method**

**Renewal Information**

**Balance Due Now**  
 \$0.00  
 Next Payment  
 Jul 20, 2023  
 Last Payment  
 \$35.99 on Jun 20, 2023

**Statements**

Date	Statement#	Amt
Jun 14, 23	01668531	\$35.99
May 14, 23	01616279	\$35.99
Apr 14, 23	01564097	\$35.99

**Payment Action**  
 Make Payment  
 Delay Next Payment  
 Change Payment Date  
 Post Chargeback  
 Refund Payment  
 Suspend

## Changing/Delaying Payments

Wellness plans are A fantastic service for both pets and pet parents because they provide essential care to pets while allowing owners to budget accordingly.

Sometimes life happens and customers miss a payment, if you are diligent you can help pet parents even when those issues arise.

To help combat missed payments and the fees that accompany, you can schedule A date past than the 15th of the month for customers who just need A few more days. In order to do this you can click on the customer, if there is a pending payment you will need to click the "Change" link next to the "Planned" payment.

**Merchant Alerts**

VCP provides wellness payment issue support. Merchant provides wellness expiring card support.

**Plan Details**

Merchant: VCP Training Practice (Test)  
 Name: **gill mill**  
 Customer Since: May 12, 2023  
 Plan Id: 1000635312  
 Account#: 548743  
 Wellness Plan: Canine Enhanced Wellness  
 PIMS Client ID: d6sfd6  
 PIMS Patient ID: fsgd6g7h  
 Current Services Start on: May 12, 2023  
 Current Services Expire on: May 11, 2024  
 Plan Status: Active

**Billing Information**

Monthly Payment: \$96.00  
 Plan Amount: \$1,152.00  
 Plan Contract Balance: \$960.00

**Balance Due Now**  
 \$96.00  
 Next Payment  
 Aug 12, 2023  
 Last Payment  
 \$96.00 on Jun 13, 2023

**Pending Payments**

Jul 12, 23 \$96.00 **Planned Change**

**Statements**

Date	Statement#	Amt
Jul 07, 23	01706308	\$96.00
Jun 07, 23	01653668	\$96.00
May 12, 23	S0001122	\$0.00



Once you have stopped the current payment you can then select A new payment date.

The screenshot displays the NewDay Veterinary Care interface. On the left, a sidebar shows the customer's profile for 'King Tut Tut', a Chinese Crested dog, and a list of services including 'Adult Male Canine', 'Chinese Crested', and 'On Canine Premium Wellness 2021\*\*'. The main content area is divided into several sections: 'Plan Details' (Merchant: NewDay Veterinary Care - Gainesville, Name: Alethea Dunajewski, Customer Since: Nov 28, 2022, Plan Id: 1000455590, Account#: 408273, Wellness Plan: Canine Premium Wellness 2021\*\*, PIMS Client ID: 28941-ND, PIMS Patient ID: 29915-ND, Current Services Start on: Nov 28, 2022, Current Services Expire on: Nov 27, 2023, Plan Status: Active), 'Billing Information' (Monthly Payment: \$66.00, Plan Amount: \$792.00, Plan Contract Balance: \$132.00, Unpaid Fees: \$0.00, Final Scheduled Billing Date: Oct 15, 2023, Remaining Scheduled Billings: 2, Billing Status: Ongoing), 'Payment Method', 'Renewal Information', and 'Additional Information'. A dropdown menu for 'Payment Action' is open, showing options: 'Payment Action', 'Make Payment', 'Delay Next Payment', 'Change Payment Date', 'Post Chargeback', 'Refund Payment', 'Fee Adjustment', and 'Suspend'. On the right, a summary box shows 'Balance Due Now \$0.00', 'Next Payment Sep 15, 2023', and 'Last Payment \$66.00 on Aug 16, 2023'. Below this is a 'Statements' table with columns 'Date', 'Statement#', and 'Amt'.

Date	Statement#	Amt
	01768955	\$66.00
	01715849	\$66.00
	01663083	\$66.00
	01610650	\$66.00
	01558274	\$66.00
	01505727	\$66.00

The screenshot displays the NewDay Veterinary Care interface with the 'Delay Next Payment' form open. The form includes fields for 'Reason' (set to 'Lost Job'), 'Next Payment Date' (Sep 15, 2023), 'Monthly Payment' (\$66.00), and 'Desired Payment Date' (Sep 16, 2023). A 'Delay Next Payment' button is visible. The sidebar on the left shows the customer's profile for 'King Tut Tut'. The main content area also displays the 'Plan Details' and 'Billing Information' sections. On the right, a summary box shows 'Balance Due Now \$0.00', 'Next Payment Sep 15, 2023', and 'Last Payment \$66.00 on Aug 16, 2023'. Below this is a 'Statements' table with columns 'Date', 'Statement#', and 'Amt'.

Date	Statement#	Amt
	01768955	\$66.00
	01715849	\$66.00
	01663083	\$66.00
	01610650	\$66.00
	01558274	\$66.00
	01505727	\$66.00

Note: They system will allow NewDay employees to schedule A payment three weeks (21 days) out from the 15th.

If A customer reaches out to VCP, their staff can only schedule the payment out an additional days past the 15th.

**NewDay Veterinary Care - Gainesville**

Welcome! Kathryn Schultz

Home Operations Plans Reports Settings

**Customer: 408273 - Alethea**

**King Tut Tut**

- Adult Male Canine
- Chinese Crested
- On Canine Premium Wellness 2021\*\*

**Delay Next Payment**

Reason:

Next Payment Date:

Monthly Payment:

Desired Payment Date:

Delay Next Payment

**Balance Due Now**  
\$0.00

**Next Payment**  
Sep 15, 2023

**Last Payment**  
\$66.00 on Aug 16, 2023

Statements/Payments

Make Payment

**Customer**

**Customer Detail**

Available Services with History

Tools

Cancel Plan

Post Memo

Please be aware that modifying the payment date will not affect or delay the subsequent month's payment. For instance, if you postpone the October payment to November 1st, the system will still withdraw the next payment on November 15th.

## High risk verses DOA

It is of utmost importance that we provide support and guidance to our customers regarding payments. This will not only help them avoid unnecessary missed payment fees but also ensure that they can afford to keep their pet on the plan for the long term.

If a customer misses two or more payments, their chances of becoming current and staying on the plan decrease to approximately 20%. Therefore, it is advisable to reach out to these customers on a weekly basis in order to assist them in getting their plans back on track. It's important to note that a plan with three or more missed payments is considered high risk, as the likelihood of further missed payments in the following months increases significantly. Once a customer reaches three missed payments, their ability to bring their account up to date and remain on the plan dwindles to around 5-7%. If a plan has three or more missed payments, it is considered DOA (dead on arrival), meaning that the customer will be unable to pay the outstanding balance and reinstate the plan. Additionally, the chances of collecting any balance from the customer after this point are highly unlikely.

# 05

## Cancellations: Understanding the Process & Ensuring Consumption

Life happens! We understand that sometimes plans need to be canceled due to a number of different circumstances, when A customer decides to cancel A plan it can be A daunting process.

VCP does have the cancellation formula that should reflect the amount paid towards the plan, wellness plan items consumed, and the difference between the two.

**Cancel Plan** How-To ?

**Current Plan Status:**

Contract Term:	Jun 10, 2023 - Jun 09, 2024
Plan Price / Retail Price:	\$624.00 / \$1,452.00
Total Payments Applied Towards Plan:	\$156.00 <b>A</b>
Outstanding Fees Due:	\$0.00
Remaining Plan Balance:	\$468.00
Balance Due:	\$0.00

**Cancellation Settlement Overview**

Retail Value of Services Provided (A):	\$0.00 <b>B</b>
Total Payments Applied Towards Retail Value (B):	\$156.00
Outstanding Fees Due (C):	\$0.00 <b>C</b>
Enrollment Fee:	\$0.00
Proposed Settlement Amount (D):	-\$156.00 $D = A - B + C$

**Enrollment Fee is not refundable.**

Agreed Settlement Amount:

Amount cannot be more than Plan Payoff Amount plus outstanding fees

(Reminder: Any Outstanding Fees Will Be Charged to Practice)

How Should the Payment be Collected? Settled at Practice ☐

**Customer**

- Customer Detail
- Available Services with History
- Tools
- Cancel Plan**
- Post Memo
- Activity Log
- Action Queue
- Transactions
- Customer Communication
- Users
- Documents

A: Total of payments made.

B: Retail value of services (excluding discounted items).

C: Proposed settlement

To ensure accurate consumption, you need to check the services used and their retail value in Pulse. Additionally, calculate any discounts applied to additional services and products not covered by the wellness plans. The total amount the customer is responsible for is determined by adding the retail value of services and discounted items. In many cases, it is more cost-effective for customers to stay on their plan.

After canceling a plan, remember to remove any related packages or credits in Gingr.

Please note that refunds should not be given to customers without approval from your Regional. If there is a situation where a refund is warranted, such as when a pet has passed away and the owner has paid for the plan in full, please consult your Regional for guidance and approval.

The following excerpt outlines our policies regarding cancellations.

**Cancellation:** Either Provider or Member may cancel this Agreement at any time, but there may be monies due upon cancellation. In the event that cancellation of this Agreement results in monies due from Member, such monies shall be paid in full at the time of cancellation. In the event cancellation results in monies due to Member, such monies will be paid by Provider within 6-8 weeks. If Member cancels this Agreement for any reason within 4 business days of initial enrollment, the initial enrollment fee is non-refundable. If Member cancels for any reason after 4 business days including but not limited to, the death or loss of Pet or transfer of ownership, whether before or after Provider has rendered services, Provider shall be entitled to receive, retain or recover from Member all monthly installments that have previously been paid or that become due prior to cancellation, including the installment for the month in which the cancellation occurs, regardless of the cancellation request date. In addition, upon cancellation prior to the end of the Plan Period, if the total undiscounted retail value of Plan services provided exceeds the sum of monthly installments collected for that Plan Period, Member shall be obligated to do one of the following:

- a) Immediately pay full retail fees for all services provided (with all discounts reversed as if the Plan had not been in effect for the Plan Period) to the extent such fees exceed the total of monthly payments received by Provider; or
- b) Continue making the monthly payments as they become due for each remaining month until the first anniversary of the first day of that Plan Period.

In the event Provider chooses to cancel the Plan except following Member's default, Provider will refund a prorated portion of the initial enrollment fee (for cancellation in the first Plan Period only) and waive any monthly payments that shall have otherwise become due under the Plan for the month in which cancellation occurs and for all future months in the Plan Period, and Provider shall be discharged from any further obligation to provide services under the Plan.

**Default:** In the event Member fails to pay any monthly installment on or before its due date, Provider has the option to immediately cancel this Agreement or discontinue Plan services and declare all remaining monthly installments for the then current Plan Period to be immediately due and payable. After 30 days, the Member's account may be referred to a collection agency. Collection activity may negatively impact Member's Credit Bureau information. If Provider permits Member to restart a Plan after cancellation under this Section, a new enrollment fee will be required unless special arrangements are made between the Member and Provider and agreed to in advance in writing.

# 06

## Best Operational Practices : How Well Are Your Wellness Plans

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To make the most of your VCP solution, we recommend reviewing the following items on a regular basis. By allocating some time each week or month, you can ensure smooth billing and payments while maintaining an up-to-date system:

### Daily

1. **Review New Application List:** Take a look at the list of new applications and establish a process for canceling pending applications that are no longer valid or are over a week old. This will help avoid clutter in the new Applications screen and prevent confusion.
2. **Run Download Payments Report:** Review new plans and ensure that the first payment and enrollment were taken at the practice. Compare this information with the payments recorded in your Practice Management System (PIMS) to ensure they reconcile properly.
3. **Upload Signed Documents:** It's recommended to upload signed wellness plan agreements and credit check forms (if applicable) into the system using the document upload function in Customer Detail. Alternatively, you can maintain an external file where these documents are retained.
4. **Resolve Payment Issues:** Review all items with a status of "New Issue" on the Payment Issue list, which can be found at [Operations > Payment Issue List](#). It's important to address and resolve these issues before the next month's billing date to avoid auto-suspension of the account.

## Weekly:

1. **Review Suspended Plans:** Check for any plans that have been suspended and take appropriate action to resolve them. Remember to document any activity in the VCP platform and the patient/client chart in your practice management system.
2. **Check Pending Plans:** Regularly check for plans that have been signed by the client and mark them as complete in Operations > New Application. Only when marked as complete will the system initiate the monthly billing process.
3. **Credit Card Expiration Report:** Review the report and contact clients whose cards will expire within the next month. Determine if they have an appointment scheduled and make a note in their file or an appointment calendar to obtain updated payment information.
4. **Reconcile Weekly ACH Settlement Statement:** If applicable, reconcile the weekly ACH settlement statement against your bank statement on a weekly basis.
5. **Review Plans Coming Up for Automatic Renewal:** Stay proactive by reaching out to clients ahead of time about plan renewal, even though the system sends a renewal notification. Make a note in their PIMS account to discuss renewal if the pet has an upcoming appointment.
6. **Consumption Report:** If applicable, create a consumption report from your PIMS and upload it into the EC platform using Operations > Service Consumption. Update the platform's consumption manually on a daily or weekly basis if not using a report.

## Monthly:

1. **Review Monthly Statement:** On the 1st of each month, review the Monthly Statement for fee charges, monthly recurring payments, etc.
2. **Account for In-Practice Payments:** Whenever you receive payments at the practice, ensure they are recorded in the VCP platform (except for the initial payment, which is automatically recorded at enrollment). Go to the Customer Detail page for the client/pet and choose Make Payment from the menu on the left. Refer to the Payment Management training document in the Support section for more information on manual payments.
3. **Review Suspended Plans:** Review plans that have been suspended due to payment issues. Follow your internal process for either sending unresolved accounts to a collections agency for hard-collections or write-off as bad debt.

## Security/System Access:

1. **Manage User Accounts:** Ask your Account Advisor to disable accounts for employees who no longer work at your practice. Request new login credentials for new hires along with their specified access level.

By following these recommendations and regularly reviewing different areas of your VCP solution, you can enhance your billing and payment processes while ensuring system security and access management. Should you need any further assistance or have additional questions, feel free to ask!