

# Wellness Plan Retroactive Enrollment Instructions

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Any client can retroactively sign up within 7 days of their pet's initial visit to have wellness plan services credited towards enrollment on a plan. Only items used will be credited back-they will not get the additional discount applied to other items/services purchased during the initial visit.

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| 1 | Calculate the total amount of services that would be included the plan that were used during the initial visit by going into the previous invoice history.  |
| 2 | Select desired plan level for patient.  |
| 3 | At this time where you would NORMALLY enter the clients first month payment under the payment plan status box- when you hit "add charge" instead of adding the first month payment you will add the total amount of services used on the initial visit – <b>deducting \$50</b> . (If they used \$120 of eligible wellness plan services on day one- you would only "add charge" for \$70) This way you can add the membership fee in the retro process, and not have to charge them the \$50 enrollment at check out. |
| 4 | Follow the normal steps for any sign up- the only items added to the invoice will be the enrollment fee and anything else the client is getting <b>TODAY</b> - do not add the items used on the initial visit to the invoice.   |
| 5 | From the wellness plan screen <b>CHANGE THE QUANTITY</b> of the items that were used on the initial visit. (Example if the client received exam, rabies, and a pedicure- the exam would be reduced by 1, the rabies to 0, and the pedicure from 2 to 1) then SAVE before exiting.   |
| 6 | Go to check out client. Select WRITE OFF as the payment method- the amount that you write off will be equal to the amount you put in the "add charge" PLUS the \$50 enrollment fee. This way the system is calculating that they were charged the membership fee at this time and it was utilized from the wellness plan items. This will leave them with a \$0 balance – unless they purchased anything else today or are doing an annual payment.   |
| 7 | Check out the client.   |
| 8 | Go back into the patient's wellness plan screen and set up the payment plan as you normally would. If the total plan annual cost was \$750, with the above example they would now have a total annual due of \$680 that can be broken up into monthly payments as normal.   |

If the client wants to pay in full- you would follow the above steps, but "add payment" twice. Once for the amount used on the initial visit deducting \$50, then for the remaining plan balance- and they will pay for the entire year at check out.

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