

Delivering Plan Services, Payment Failures, Plan Changes

Last Modified on 10/17/2024 11:09 am PDT

Delivering Plan Services

Why do we need to order plan services from the wellness plan screen and NOT use quick invoicing?

When providing services for a pet enrolled on a wellness plan, it's imperative that all plan services are ordered from the patient's wellness plan screen (not quick invoicing). Quick invoicing is NOT a reliable way to ensure items are consumed from the plan. Failing to order items from the pet's wellness plan screen leads to inaccurate reporting and production.

Don't we lose money if we offer unlimited office visits?

Offering clients the opportunity to come in at any time and have their pet examined is a win-win. This prevents clients from waiting until a problem is out of control to see their pet's provider. It also creates a stronger sense of partnership, and helps build rapport and trust with clients and their pets. While the office call is always free, often when there is an underlying issue or concern, the labs, tests, or treatments are not included in the price of the plan.

How do we make edits to plan items if our hospital inventory/manufacture/labs change?

If you have inventory/manufacture/lab changes and need to update plan items, contact wellnessplans@wellhaven.com. This includes if you accidentally delete a plan item or notice a discrepancy. Failing to reach out to the wellness plan team can negatively impact plan items, pricing, and doctor production.

Plan Payment Failures

How do we know if a client's monthly payment fails?

If a client's payment fails due to an expired card, non-sufficient funds or an invalid card number, your hospital will be notified via email. A daily email with failed payment transactions is sent to the main hospital email address from auto@evetpractice.com. It is important to make sure this email address is added to your approved senders list so it doesn't go into a junk email box.

- The email from Pulse will contain the client name and credit card failed transaction reason/code.
- Running the Payment Plan Report from Pulse (eVet) and reviewing the failed/declined transactions on a regular basis will help catch failed payments and deleted card issues (be sure to check "Include error transactions" when running the report).

How do we notify clients if their account is past due?

If you receive notification from Pulse (eVet) about a failed payment, please see the [Wellness Plan Hospital Collections Policies & Process](#).

Do we charge any resubmission or NSF fees for payment failures?

We do not charge any resubmission or NSF fees if a client's automatic payment for a plan doesn't process as scheduled. Note: Our plan agreement does state we *may* collect a \$20 resubmission fee, but this is not yet in place.

Plan Changes

Can a client change to a different plan before the current plan expires?

Plans are a 1-year contract. There are no options in Pulse (eVet) to easily upgrade or downgrade the plan within the contractual year. If there is a medical reason with extenuating circumstances to make changes to the plan (e.g. pet develops an unsafe heart murmur and has a dental plan), please email wellnessplans@wellhaven.com for assistance.

How do we cancel a plan?

There are various reasons a client may wish to cancel a plan. Plans are a 12-month agreement so often times if a client wants to cancel mid-year there may be a balance owed if more services were delivered than already paid for. Ensure you clarify with the client if they want to cancel or if they are requesting to not have their pet's plan auto-renew.

All cancellations should be directed to your Practice Manager to resolve with the client. For specific information about plan cancellations please reach out to wellnessplans@wellhaven.com.
