

Wellness Plans Resources – Table of Contents

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The following are links to resources found in the WellHaven Knowledge Base

FOR CLIENTS & HOSPITAL TEAMS

- [Client FAQ Sheet](#) – Wellness Plans/Care Companion Plans
- [Wellness Plans/Care Companion Plans Info Sheets](#) (examples)
 - Hospital leaders request these info sheets with their specific pricing from the Wellness Plan team.
- [Why a Care Companion Plan Is a Smart Financial Move for Pet Owners](#)

FOR HOSPITAL TEAMS

- [Hospital Team FAQs](#)
 - [CCP Talking Points for Hospital Teams](#)
 - [Importance of Client Retention.pptx](#)
 - Video Demo: [How to Enroll a Wellness Plan](#)
 - Use this process to ensure payment schedules are correctly set up.
 - Instructions: [Retroactive Active Enrollment for Wellness Plans](#)
 - Clients can retroactively sign-up within 7 days of their pet's initial visit.
 - [Wellness Plans Administration SOP](#)
 - Use this SOP for recommended daily, weekly, and monthly plan administration & best practices.
 - How To: [Updating Stored Credit Cards for Wellness Plans](#)
 - Use this process to ensure a new card correctly attaches to the payment plan.
 - [Wellness Plans Past Due/Collections Policy & Process](#)
 - When you receive an email from Pulse regarding a client's wellness plan payment failing, take the necessary steps to notify clients and resolve any past due balances.
 - [Cancellation Spreadsheet-6efd43.xlsx](#)
 - Calculator to determine what is owed if a client requests plan cancel (updated March 2025)
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