

Quick Look Revenue Reporting Guide

How do preventive care plans impact your practice?

Petly Plans enables pet owners to say yes to your care recommendations. This can improve compliance and result in increased revenue for your practice. For a comprehensive understanding of how Petly Plans impacts your practice, you should consider Petly Plans and your practice management software data together.

Overview

By using the reports outlined in this guide, you can get a general 'pulse' from both Petly Plans and Cornerstone to give you a picture of plan activity and revenue.

Report Name	Source	Data Points	Instructions
Item Usage History Report <i>Menu > Reports > Plan Item Usage History</i>	Petly Plans	Gross revenue generated from plan items (PIMS price)	Run this report and compare month-over-month, quarter-over-quarter and year-over-year
Hospital Fees Report <i>Menu > Reports > Hospital Fees</i>	Petly Plans	Plan member expense data* <i>*Note this does not include Authorize.net or Platinum Payment fees</i>	Run this report and compare month-over-month, quarter-over-quarter and year-over-year
Monthly Sales Summary <i>Reports > End of Period > End of Month</i>	Cornerstone	Gross revenue, new clients, # of posted invoices and patient visits should increase after plan implementation	Run this report and compare month-over-month, quarter-over-quarter and year-over-year (year one: run a pre- and post- plan implementation period)
Client Patient Report Builder <i>Reports > Client Patient Report Builder</i>	Cornerstone	New patients (date record created and last visit date) - look for # of new patients on plans (via patient classification)	Run this report and compare month-over-month, quarter-over-quarter and year-over-year (year one: run a pre- and post- plan implementation period)
Petly Plans Status Reports <i>Menu > Reports > Wellness Plans > Active Plans/New Plans by Month/Cancelled Plans by month</i>	Petly Plans	Active plans, New plans created, Cancelled plans	Run this report quarterly and compare past and current periods
Plan Renewals (Custom) <i>Menu > Reports > Wellness Plans > Custom report, see instructions</i>	Petly Plans	Plans that renewed within a set time period	<ol style="list-style-type: none"> 1. In the initial Plans or Renewal Plans field, select Renewal Plans. 2. In the Plan Start Date area, select a specific month/year to find plans that renewed in that month/year, or select a date range. 3. In the columns to include area, select columns you want on the report. 4. Click Generate Report. Run this report quarterly and compare past and current periods
Unused Items on Active Plans <i>Menu > Reports > Plan Item Data > Unused Items for Active Plans</i>	Petly Plans	Active Plan items yet to be used	Run this report to market to clients whose plans are approaching their completion date
Serv. and Inv. Sales - Closed Inv. - by Class Desc or Staff <i>Reports > End of Period > End of Month</i>	Cornerstone	Gross revenue per class/subclass or by staff at class/subclass level - look for growth across exams/professional services, vaccines, diagnostics, pharmacy and nutrition.	Run this report monthly/ quarterly and compare past and current periods

Compliance Assessment Tool: the Compliance Assessment Tool within Cornerstone can be set up to look at compliance on preventive care protocols for plan versus non-plan members. [Instructions for setting up the Compliance Assessment Tool can be found here.](#) We recommend creating a single plan protocol for each species, and including plan and non-plan equivalent services within the same protocol. If you're using patient classifications, you will be able to see how plan members are consuming services differently from non-plan members.