



# Health Care Plan Guidance

2.7 Feature Documentation

## How to Structure my plans?

There are multiple methods of constructing your Health Care Plans in order to meet your business requirements. The below is a guide on what to consider when constructing your plans.

What are my Health Care Plans?

The first step is to consider what types of health care plans you are looking to implement. There are no limits to the number of health care plans you can create. However more plans require more administration.

An example set up of Health Care Plans is shown below. Note that this is not the only way to setup your plans as the system is flexible to tailor discount amounts/discount availability. However, this is a common setup that we recommend. (*Prices are set for demo purpose only and are not a true reflection on market pricing*).

Health Plan Id	Description	Sales Start Date	Sales End Date	Monthly Cost	Available For Sale	Plan Status	Species	Treatment Group
2190	Cat Plan	11/02/2017	11/02/2019	20.00	Active	Live	Feline	✓
1121	Kitten Plan	11/02/2017	11/02/2019	10.00	Active	Live	Feline	✓
2195	Large Dog Plan	11/02/2017	11/02/2019	30.00	Active	Live	Canine	✓
2189	Medium Dog Plan	11/02/2017	11/02/2019	20.00	Active	Live	Canine	✓
2207	Puppy Plan	11/02/2017	11/02/2019	10.00	Active	Live	Canine	✓
2193	Rabbit Plan	11/02/2017	11/02/2019	30.00	Active	Live	Rabbit	✓
2194	Small Dog Plan	11/02/2017	11/02/2019	10.00	Active	Live	Canine	✓

Health Care Plans are specific to a patient's species. In the above example, we have added the following plans:

### Dog Plans

- Small Dog Plan (under 10kg)
- Medium Dog Plan (10-25kg)
- Large Dog Plan (26kg+)
- Puppy Plan

### Cat Plans

- Cat Plan
- Kitten Plan

### Other Plans

- Rabbit Plan

Creating plans this way allows you to have different pricing for animals based on size and age.

What are my Core Categories?

A Core Category is a Treatment Group that is used to flag your main Treatment Groups. If an account was not fully paid when the plan is ended, the core categories treatments value is used to calculate the debt value against the payments taken. Not all categories count towards the plan value such as 10% off food so this would not be a core category.

Vet Space recommend your core categories to be items/services that are the main reason a Client joins their patient onto a Health Care Plan. For example: Vaccinations, health checks, wormer and flea treatment.

When you end or renew a plan the core categories provide an indicative pricing of what is used.

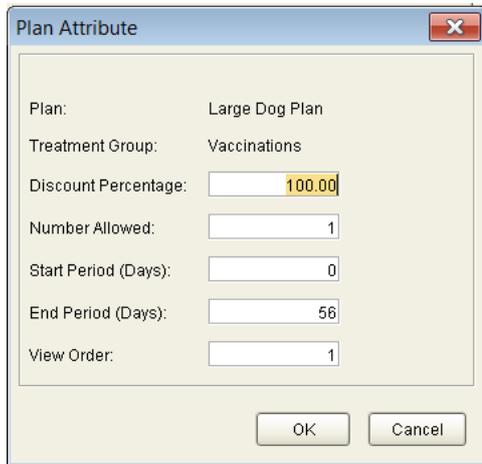
Non-core categories are benefits such as discounted diets.

When are your Core Categories available?

It is important to consider the availability of your core categories. Vet Space recommends tightening the availability of core items in order to avoid a scenario of a patient joining a health plan, benefitting from all treatments within the first few months and failing to pay their direct debit once they have received treatments. However, it is also important to allow flexibility to avoid the scenario of a Patient coming into the practice for a vaccination, however because their appointment is 1 day early/late the system will not discount as the discount is not available.

As mentioned above, it is important to restrict the availability of your stock to avoid undercharging.

For example, if you are wanting to limit the amount of vaccinations available to health care plan patients, we can set the number of vaccinations allowed (1) within the first 8 weeks of joining the plan (56 days).



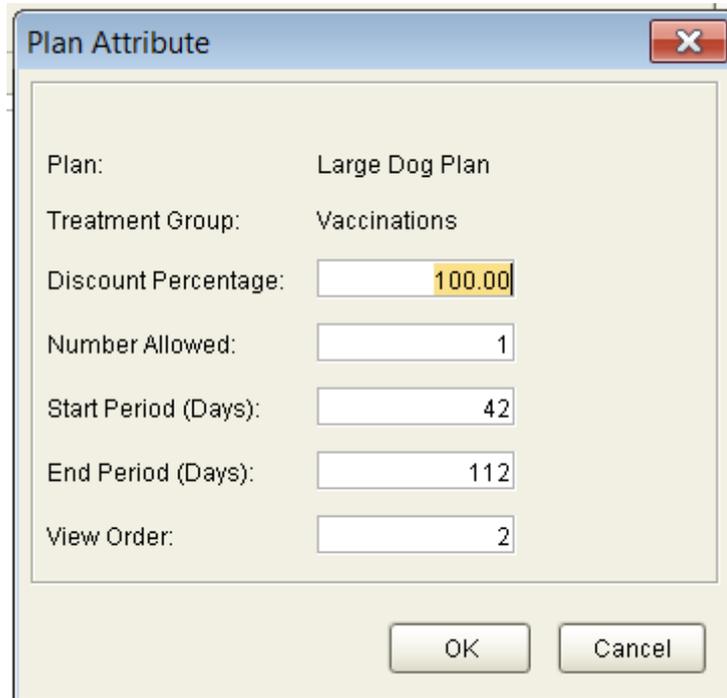
The screenshot shows a 'Plan Attribute' dialog box with the following fields:

- Plan: Large Dog Plan
- Treatment Group: Vaccinations
- Discount Percentage: 100.00
- Number Allowed: 1
- Start Period (Days): 0
- End Period (Days): 56
- View Order: 1

Buttons for 'OK' and 'Cancel' are visible at the bottom.

We can then add the treatment group again with different attributes, for example the next allowance would be 1 vaccination allowed 8 weeks to 16 weeks after joining the plan.

You will notice that we added the start period as 42 (6 weeks after plan start date, rather than 8 weeks). The reasons for this is to allow for a 2-week grace period. For example if the patient has come in for their appointment 2 weeks earlier than anticipated, they would be eligible for the discount.



The screenshot shows a 'Plan Attribute' dialog box with the following fields:

- Plan: Large Dog Plan
- Treatment Group: Vaccinations
- Discount Percentage: 100.00
- Number Allowed: 1
- Start Period (Days): 42
- End Period (Days): 112
- View Order: 2

Buttons for 'OK' and 'Cancel' are visible at the bottom.

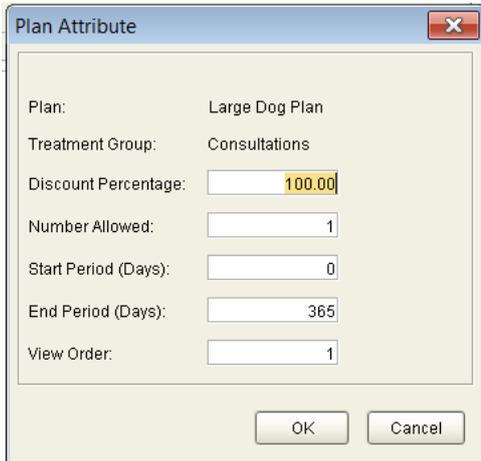
Note that the view order is set to 1 for the vaccinations available 0 to 56 days and the view order is set to 2 for vaccinations available from day 42 and end 112.

This means that within the crossover period (After 42 days to 56 days), the group with the lowest view order will be discounted first.

Your items may be available at variable discount rates based on the amount of time the animal has been on the Health Care Plan, for example: “Get your first Consultation free followed by 50% off future Consultations”.

To achieve this, you will need to add the treatment group to the Health Care Plan twice to setup the different discount amounts as below:

Firstly, the Consultations group is added with 100% discount, and number available is set to 1 so that the discount will only apply for their first consultation. View order is set to 1 for this group as it is the first discount to be applied. The start period is 0 and end period is 365 as the patient is entitled to the consultation at any time.

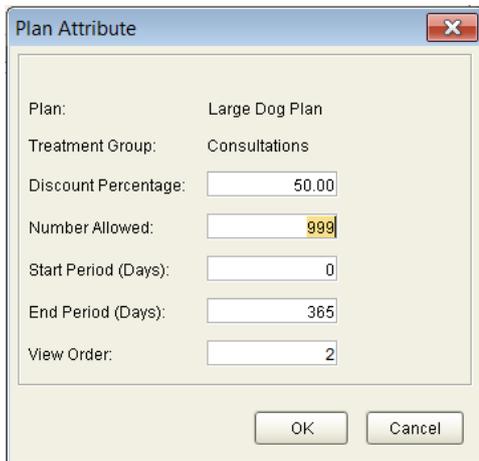


The screenshot shows a 'Plan Attribute' dialog box with the following fields:

- Plan: Large Dog Plan
- Treatment Group: Consultations
- Discount Percentage: 100.00
- Number Allowed: 1
- Start Period (Days): 0
- End Period (Days): 365
- View Order: 1

Buttons: OK, Cancel

The next step is to add the same treatment group to the health care plan but with different plan attributes. For this example, discount percentage is set to 50%, start and end periods remain the same as above, however the number allowed is set to 999 (unlimited) and view order is set to 2. View order = 2 means that this discount will only be applied once the above category with view order 1 allowed discounts have been applied.



The screenshot shows a 'Plan Attribute' dialog box with the following fields:

- Plan: Large Dog Plan
- Treatment Group: Consultations
- Discount Percentage: 50.00
- Number Allowed: 999
- Start Period (Days): 0
- End Period (Days): 365
- View Order: 2

Buttons: OK, Cancel

What are my non-core categories?

Non-core items are items/services that are discounted once the patient has joined a Health Care Plan for example, pet food, pet shop items, pet passports, nail clipping etc.

The PMS facilitates ongoing discounts and one-off discounts.

#### *One-off discounts*

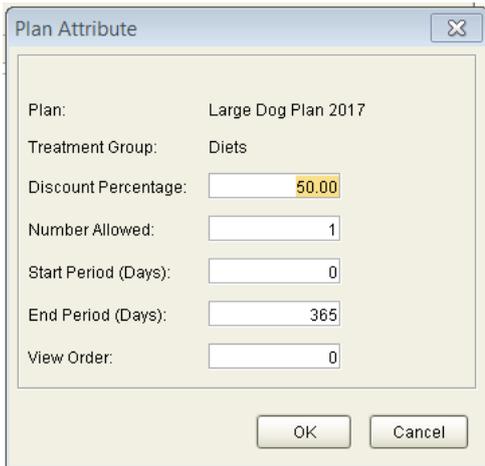
Example: '50% off first purchased bag of food'.

Discount Percentage = 50 %

Number Allowed = 1

Start Period = 0

End Period = 365



The screenshot shows a 'Plan Attribute' dialog box with the following fields:

Plan:	Large Dog Plan 2017
Treatment Group:	Diets
Discount Percentage:	50.00
Number Allowed:	1
Start Period (Days):	0
End Period (Days):	365
View Order:	0

Buttons: OK, Cancel

#### *Ongoing discounts*

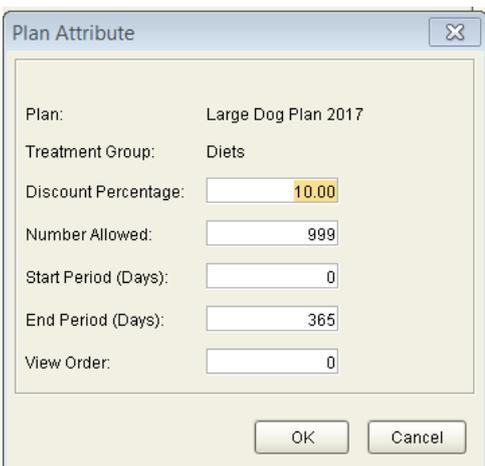
Example: '10% off all pet food'.

Discount Percentage = 10 %

Number Allowed = 999

Start Period = 0

End Period = 365



The screenshot shows a 'Plan Attribute' dialog box with the following fields:

Plan:	Large Dog Plan 2017
Treatment Group:	Diets
Discount Percentage:	10.00
Number Allowed:	999
Start Period (Days):	0
End Period (Days):	365
View Order:	0

Buttons: OK, Cancel

It is possible to combine the two types of discounts, however please note that only 1 treatment group can be assigned to a code. Therefore, to combine these discounts we recommend utilising the Start and End Period fields.

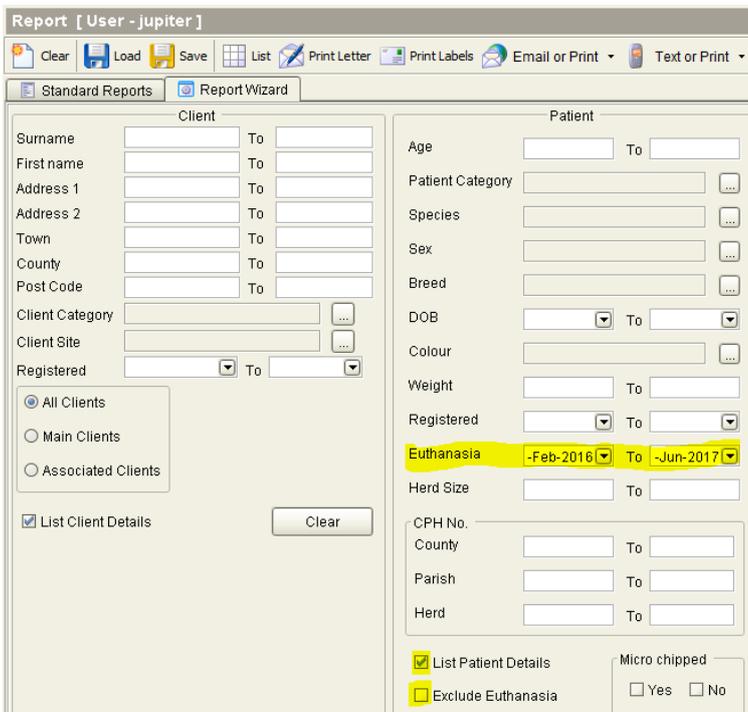
## What affects my plans?

### Euthanasia/Deceased Patients

In the event of a deceased/euthanised patient, the user will need to manually end the Health Care Plan and cancel their direct debit (dependent on the contract agreement).

A List of deceased animals can be extracted from the Reports Wizard (Marketing > Reports > Reports Wizard) using the below criteria:

- Set 'Euthanasia' dates to display patients euthanised/deceased between the dates specified
- Tick 'List Patient details'
- Untick 'Exclude Euthanasia'.



The screenshot shows the 'Report [ User - jupiter ]' window with the 'Report Wizard' tab selected. The interface is divided into 'Client' and 'Patient' sections. The 'Euthanasia' field in the Patient section is highlighted in yellow, showing a date range from '-Feb-2016' to '-Jun-2017'. Other fields include Surname, First name, Address 1, Address 2, Town, County, Post Code, Client Category, Client Site, Registered, Age, Patient Category, Species, Sex, Breed, DOB, Colour, Weight, Registered, Herd Size, CPH No., County, Parish, Herd, List Patient Details, Exclude Euthanasia, and Micro chipped.

## Patient Weight changing

If Health Care Plans are based on a Patient's weight for example: Small dog under 10kg, medium dog 10-25kg, large dog 26-40kg etc, note that a Patient's weight will change over time.

Therefore, when joining a health care plan, you should consider/estimate the patients weight over the plan length because the plan contents cannot carry over from one plan to another. The plan itself is a self-contained contract, meaning once a patient has joined a plan they remain on the plan until the plan length is exhausted.

If managing plans by weight it is also important to consider the renewal of a health care plan, for example, the below animal is joined onto the large dog plan (26kg to 40kg) we need to review whether this animal is likely to gain weight and remain in the large dog plan or if it is worth renewing the animal onto the medium dog plan.

HCP [ User - jupiter ] Back

Plans Utilities Reports Direct Debit Import

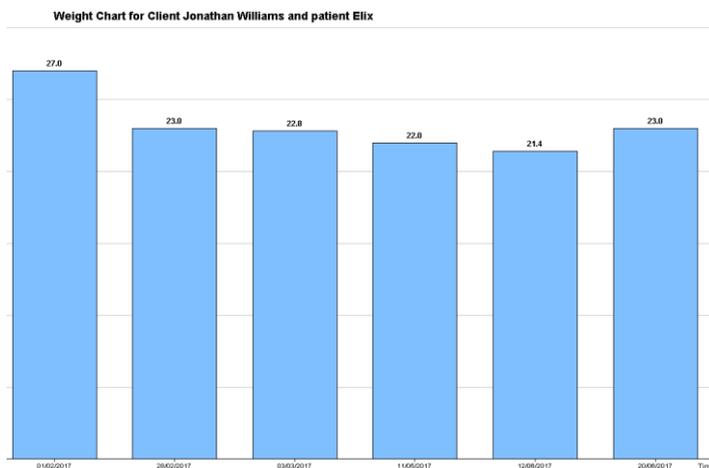
Client Site: [All]

All Active Members Suspended Animals Direct Debit Plans Renewals

Show renewals due in the next 1 Months  Include Overdue Plans Status: All

Client	Animal	Plan	Animal Weight	Renewal Date	Current Balance	Plan Cost	Outstanding Payments	Auto Action	Action Type	Write Off Debt	Renewal Plan	Action Status
Jonathan Williams	Elix	Large Dog Plan 2017	23.00	25/06/2017	0	120	10	<input type="checkbox"/>		<input type="checkbox"/>		

Looking at this example animals weight chart, I can see that he should be on the medium dog plan after his weight loss.



Therefore, I would set the plan to auto-renew onto the medium dog plan rather than renew onto large plan

Auto Action X

Auto Action this plan

Action Type

Auto Renew

Renew to this plan

Medium Dog Plan 2018

End Plan

Write Off Debt Balance

## How do I maintain my plans?

### When to collect Direct Debits?

We recommend collecting direct debits once a month. Whether this is using our integrated direct debit payment plan or if you are manually importing direct debits, we also advise looking over the direct debit amounts imported at the end of each month to ensure values are correct and to take note of any missed payments. This can be done via Utilities > Health Care Plan > Reports tab > Direct Debit Import.

### Plan Renewals

We recommend looking over HCP renewals every 12 months to ensure that Patient Plans are renewing onto the correct plans and that you are collecting the correct amount for the plan the patient has renewed onto.

The Renewals tab under Utilities > Health Care Plan > Renewals can be used to facilitate this process.

Reviewing a plan once a year is good practice. Without reviewing your renewals, you could be undercharging clients after a year and much more after 2 or 3 years.

Remember the HCP balance is indicative, if your contract with your customer is for £120 a year and this is all paid, then select 'write off debt balance' in renewal.