Vet Space®

AmerisourceBergen

Health Care Plan Pt.1 - HCP Setup

New Feature Documentation

What does it do?

The Administrative setup of the New Health Care Plan functionality has been simplified.

In order to setup Health Care plans, the following steps are required:

1. Create Health Plan Treatment Groups
2. Assign Health Plan Treatment Groups to Codes in Code Entry
3. Create Health Care Plans

1. Creating Health Plan Treatment Groups

You can create your Health Plan Treatment Groups by Selecting 'Health Care' from the Utilities menu.
Once this screen has loaded, select the Utilities Tab (**2**). Your Health Plan Treatment Groups will be shown here.
To add a new group, select 'Add Group' (**3**).

The following screen will show prompting you for the following information:

Group Name - The name of the Treatment Group.

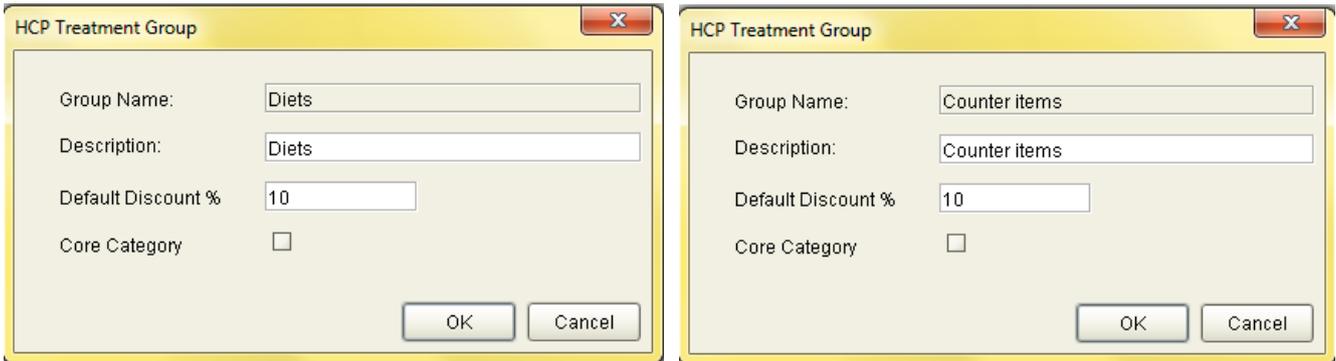**Description -** Description of the Treatment Group

Default Discount - Set default discount % amount

Core Category - 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.

In the screenshots below, I have created two Treatment Groups. One for Vaccinations with a default discount of 100% and a Treatment Group for Consultations with a 50% default discount.
These Treatment Groups are my 'Core categories'.

I would also like to setup Treatment groups for Diets and Counter Items with a default discounts of 10%.

Once you click 'OK' these items will be added to the Treatment Group Grid (as shown below).

Editing Treatment Groups

If you would like to Edit a Treatment group, highlight the group you would like to edit and select 'Edit Group' (**1**). This will allow you to change the Group Name, Description, Default Discount % or Core Category previously entered.

Deleting Treatment Groups

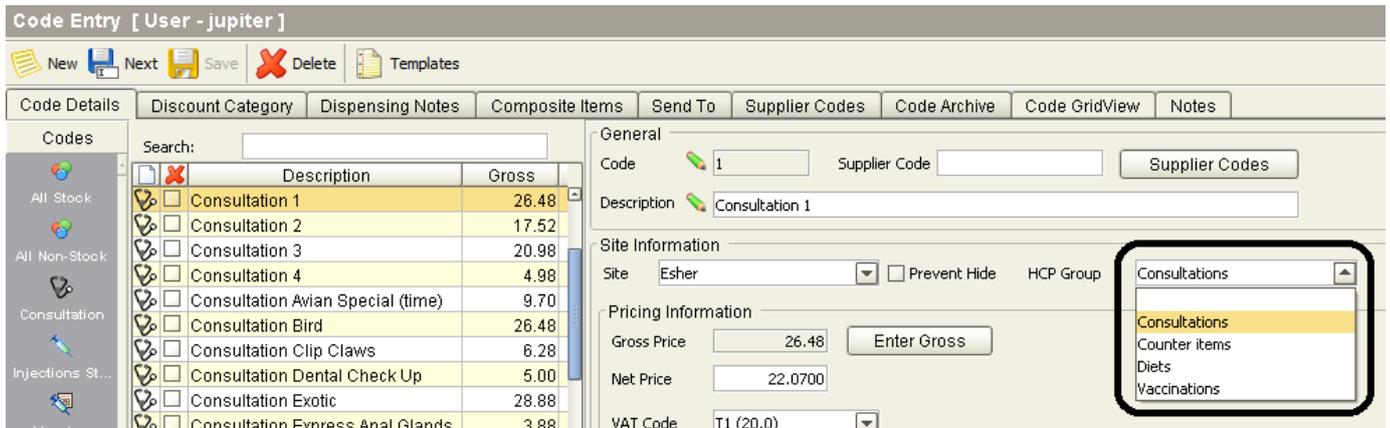To delete a Treatment Group, select the item from the Treatment Group Grid and select the 'Delete Group' button highlighted in the screenshot below:

2. Assigning Treatment Groups to Codes

Once your Treatment Groups have been set up you need to select which Codes are allocated to each group.

This can be done via Code Entry. Go to Utilities > Code Entry and select an item. After selecting an item, you will notice a new drop down box called 'Health Care Group' (shown below). Select an item from the drop down to allocate it to a code.

 In the example above I have selected the code 'Consultation 1' and I am assigning the Treatment Group I created earlier called 'Consultations'.

This means that when this code is dispensed for an animal who is joined to a HCP, the item will be automatically discounted.

3. Creating Health Care Plans

From the Main Toolbar select 'Health Care' from Utilities which will
display all your Health Care Plans. Then select 'Add Plan' (**2**) and Plans tab.

This will load the Plan Admin – Treatment Group Based screen. It is at this screen where you create your new
Health Care Plan.

Enter a Description for the plan (**1**), Cost of the plan (**2**), Start (**3**) and End date (**4**) for when an animal can join the
HCP. You must also state the Species (**5**) the plan is intended for.
The 'Plan to Replace' (**6**) field is to be used if the plan you are creating is replacing an existing HCP. If so, select the
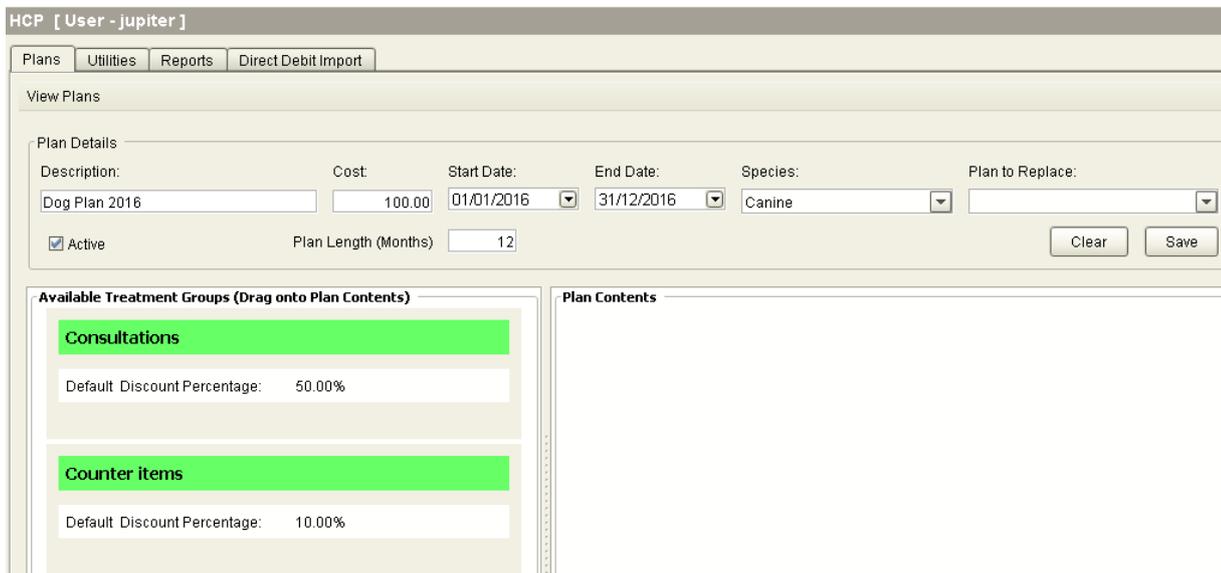plan from the drop-down list. If this is a new plan then leave this field blank.
 If you want to allow animals to join the plan, ensure 'Active' (**7**) is ticked.
Finally, select the Plan Length (Months) (**8**). Once you have completed the above fields click Save (**9**).

To clarify, note that the 'Start Date' (**3**) and 'End Date' (**4**) sets the sales period rather than start and end date of the
Health Care Plan. For example, setting the sales start date to 01/01/2016 and end date as 31/12/2016 means that
an animal can join this plan anytime between the sales dates specified. The length of the plan is set by Plan Length
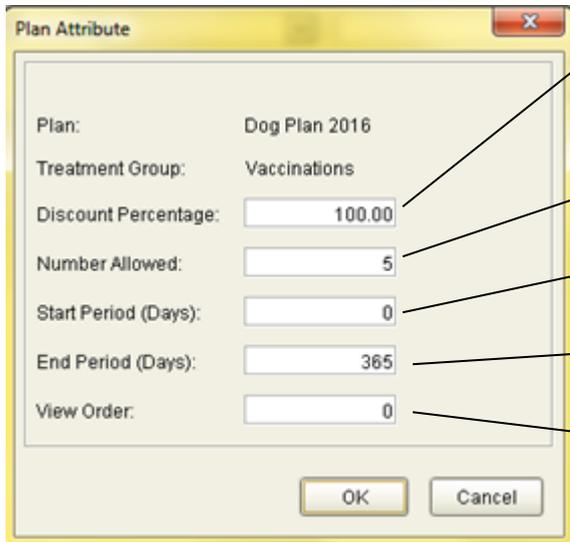(Months) field (**8**).

For example, if an animal joined the Health Care Plan on sales date '02/11/2016' their plan would expire after the
set plan length (12 months) on '02/11/2017'.

The final step is to assign your Treatment Groups to the Health Care Plan. At the Add Plan screen you will see the Available Treatment Groups that you created earlier. To assign these groups to the Health Care Plan, simply drag them from the Available Treatment Groups section and drop them into the Plan Contents Section.

For example, I would like the 'Vaccinations' Treatment Group to be part of my HCP 'Dog Plan 2016'. Therefore I click and drag 'Vaccinations' group and drag it onto the Plan Contents column.

Once the Treatment Group has been dragged into the Plan Contents column the Plan Attribute screen will display (see example image below).

Discount Percentage – The amount of discount to be applied when dispensing a code with the 'Vaccinations' Treatment Group allocated.

Number Allowed – The number of discounted items the animal can have from the 'Vaccinations' Treatment Group.

Start Period – After how many days of joining the HCP the animal is entitled to the Treatment Group discount.

End Period – After how many days of joining the HCP where the animal stops receiving the discount.

View Order – Sets which order the group shows on the Plan Contents column.

Once you have set your attributes, select Ok. This will add the treatment group to the Plan Contents Column (as shown below).

You also have the option to Edit or Delete a Treatment Group's attributes.

Once you have assigned all the required Treatment Groups to your Health Care Plan it is ready for use.

Default Settings.

In order to display Health Care Plan discounts correctly in the treatment history, ensure the default 'Show Treatment Discounts Separately' is ticked under Utilities > System > Defaults > Treatment Tab.

☑ Show Treatment Discounts Separately

I don't want to use this feature yet.

If you already have existing Health Care Plans set up using the old method then these plans will operate as normal as the functionality still exists within the system.

If you do not wish to use Health Care Plans at all, then operate as normal as items will not be discounted without the initial setup of Health Care Plans.