Health Care Plan
Pt.3 - HCP Accounts
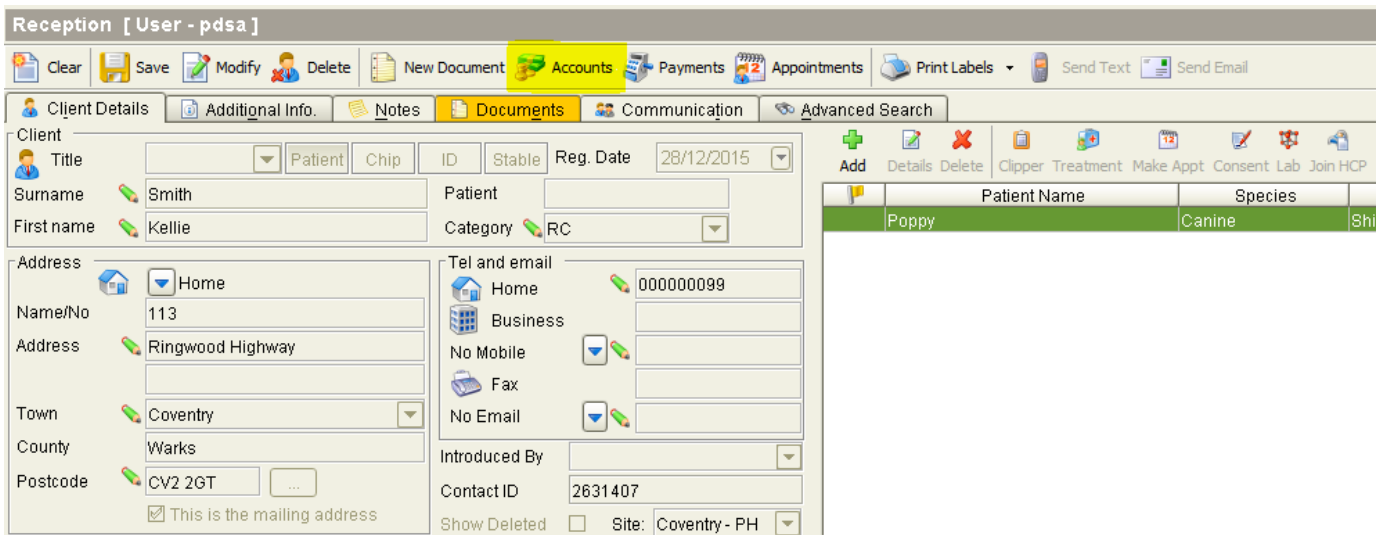
New Feature Documentation

What does it do?

Health Care Plan accounting is separated from day to day accounting.

A Health Care Plan Accounts Screen has been introduced to the system which separates Health Care Plan transactions from the Clients Account. In addition, the Daily Cash Screen has been modified to allow filtering between HCP transactions and normal day to day transactions.
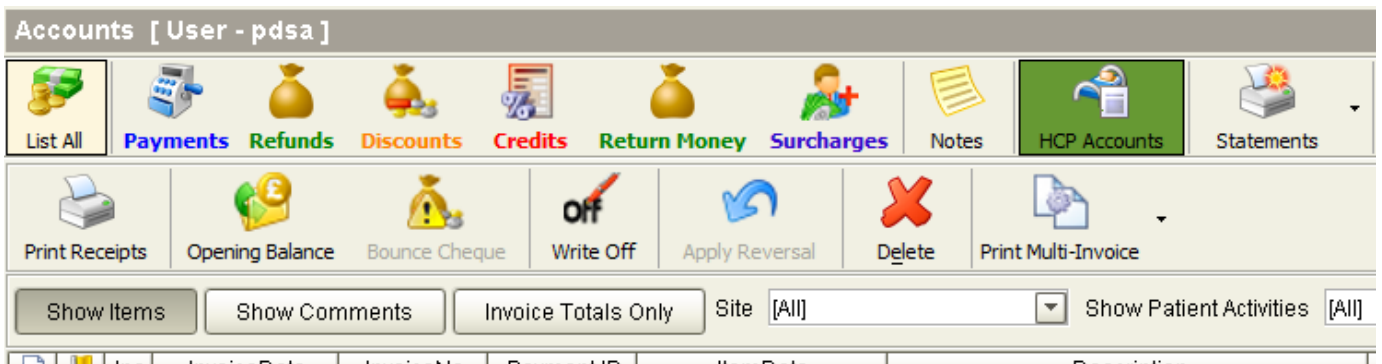
Health Care Plan Accounts

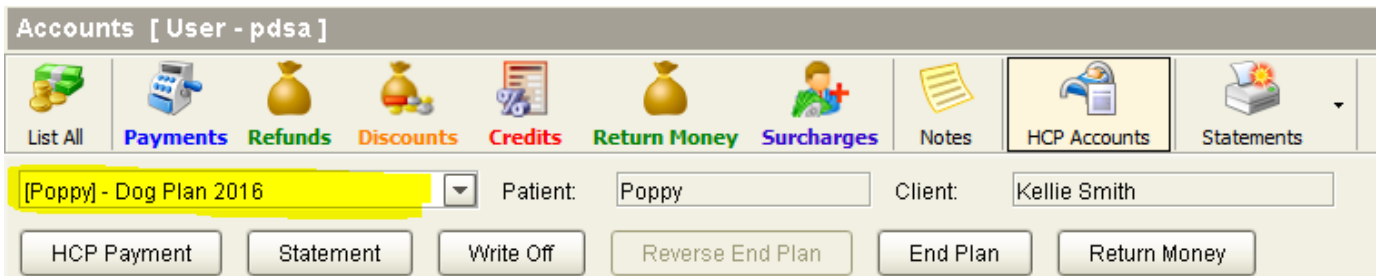To access a Client's HCP account, search for the client in Reception and go to their Accounts screen.
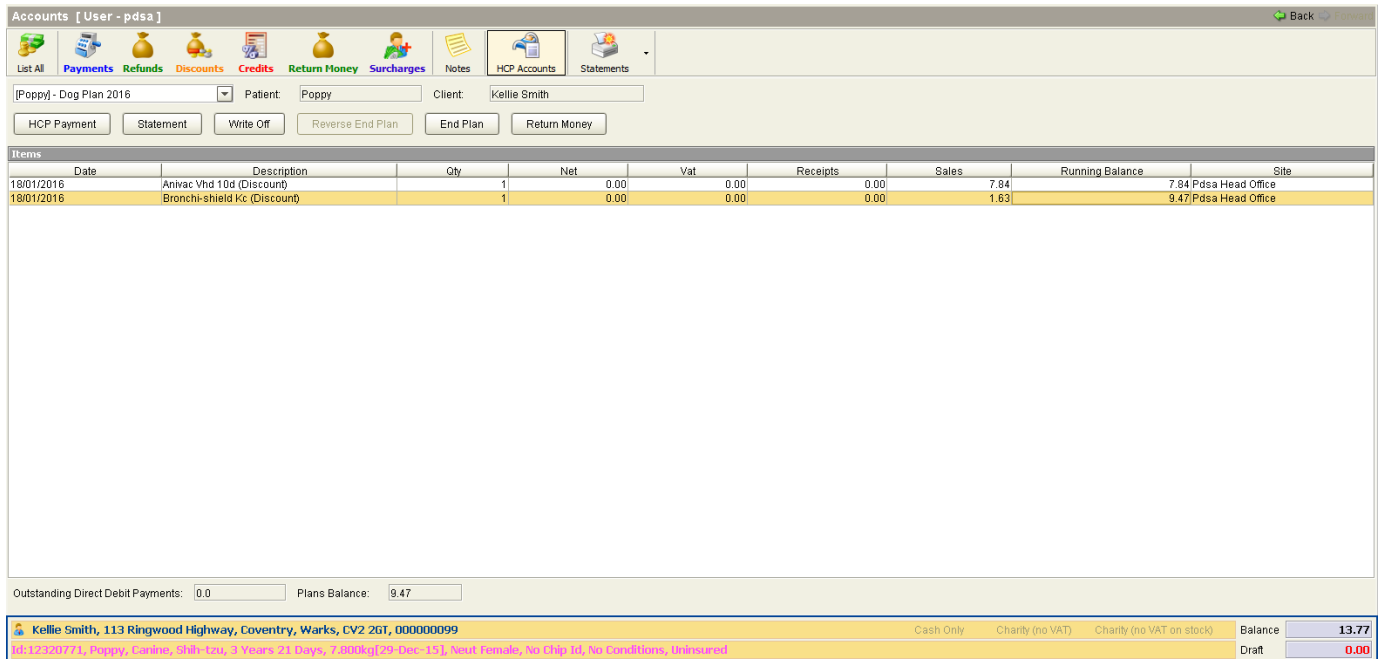

If the Client has any animals joined to a HCP, you will see a green button called 'HCP Accounts'.

This will load the Clients HCP accounts. You can select the HCP you wish to view from the drop down highlighted below:

Once you have selected a Plan from the drop down list, the Health Care Plan Account will load.

The HCP screen has the following functionality:

(**1**) **HCP Payment** - this is used to record HCP payments.
(**2**) **Statement** - Prints a Statement for the HCP Account.
(**3**) **Write off** - Writes off the Client's account consequently setting the balance to zero.
(**4**) **Reverse End Plan -** Re-joins a previously ended HCP.
(**5**) **End Plan** - Ends the animals HCP.
(**6**) **Return Money -** Returns money for a HCP payment.

The HCP Accounts Screen will also give you the details on the Client's Outstanding Direct Debit Payments and the Plans Balance.

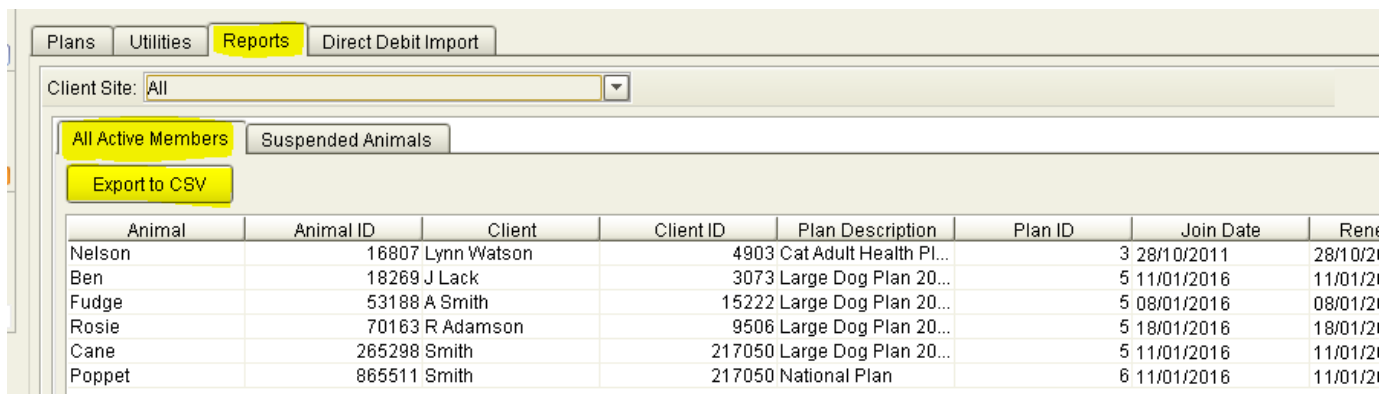*Voyager 2.7*

Direct Debit Import

The Health Care Plan module does not send information to your direct debit company, this also includes registering a client with the company to setup the Direct Debit Agreement.

You must register the customer with the Direct Debit company from the practice directly.

You will need to provide a list of essential information to your Direct Debit company for them to feed received payment details into the system.

Exporting Client Details to CSV

In order for the Direct Debit companies to update their records for your client's active plans, a CSV file is required from the system. This can be extracted from Utilities > Health Care > Reports > All Active Members. From here click the 'Export to CSV' button.

Animal	Animal ID	Client	Client ID	Plan Description	Plan ID	Join Date	Rene
Nelson	16807	Lynn Watson	4903	Cat Adult Health Pl...	3	28/10/2011	28/10/20
Ben	18269	J Lack	3073	Large Dog Plan 20...	5	11/01/2016	11/01/20
Fudge	53188	A Smith	15222	Large Dog Plan 20...	5	08/01/2016	08/01/20
Rosie	70163	R Adamson	9506	Large Dog Plan 20...	5	18/01/2016	18/01/20
Cane	265298	Smith	217050	Large Dog Plan 20...	5	11/01/2016	11/01/20
Poppet	865511	Smith	217050	National Plan	6	11/01/2016	11/01/20

Importing Direct Debits

After taking the first initial payment, all subsequent payments are taken
by direct debit. The direct debits are imported from a CSV file which is sent to you by your direct debit company. Or
if you are collecting the direct debits yourself we can provide you with the required CSV template.

Example content of the CSV file is shown below.

A	B	C	D	E	F	G	H	I	J	K	L	M	N
Customer	Customer	PetName	CollectionDate	Amount	PaymentStatus	AddressLine1	AddressLi	Town	County	PostCode	Jupiter_AnimalId	Jupiter_HealthPlanId	jupiter_ContactId
Adamson	R	Rosie	18/01/2016	10	Receipt	Harepath Road		Virginia	Surrey	GU13 8AU	70163	5	9506

The required fields are as follows:

Jupiter_AnimalId = Patient ID (Obtained from the Reception Screen)

	Patient Name	Species	Breed	Gender	DOB	Id
	Ozzy	Feline	Birman	Neut Male		69659
	Rosie	Canine	Sheltie (Shetland S...	Female	05/10/2009	70163
RIP	Meg	Canine	Sheltie (Shetland S...	Neut Female	23/09/1999	37757

Jupiter_HealthPlanId = Health Care Plan ID (Obtained from the Health Care Plan Screen)

HCP [User - jupiter]

Plans | Utilities | Reports | Direct Debit Import

Add Plan | Save As New | Edit | Active Only | Delete Plan

Health Plan Id	Description
3	Cat Adult Health Plan
4	Cat Kitten Health Plan
1	Dog Adult Health Plan
2	Dog Puppy Health Plan
5	Large Dog Plan 2016
6	National Plan

Jupiter_ContactId = Contact ID (Obtained from the Reception Screen)

Client

Title: Mr — Patient | Chip | ID | Stable | Reg. Date 10/11/2008

Surname: Adamson

First name: R

Patient:

Category: SA

Address

Home

Name/No:

Address: Harepath Road

Town: Virginia water

County: Surrey

Postcode: GU13 8AU

Tel and email

Home: 55241

Business:

Mob.Personal:

Fax:

Email Private:
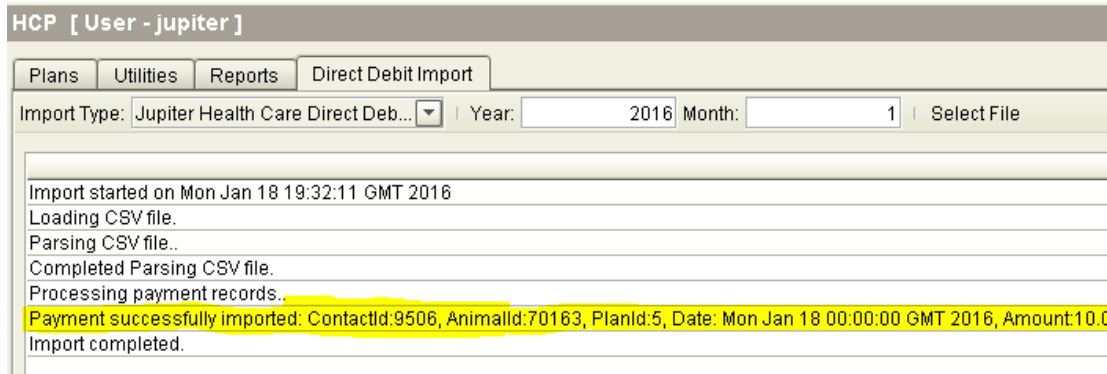
Introduced By:

Contact ID: 9506

If you have any further issues importing the CSV file, contact support@vetspace.com for further assistance.

To import your CSV file, navigate to the Health Care Plan and select the 'Direct Debit Import' tab.
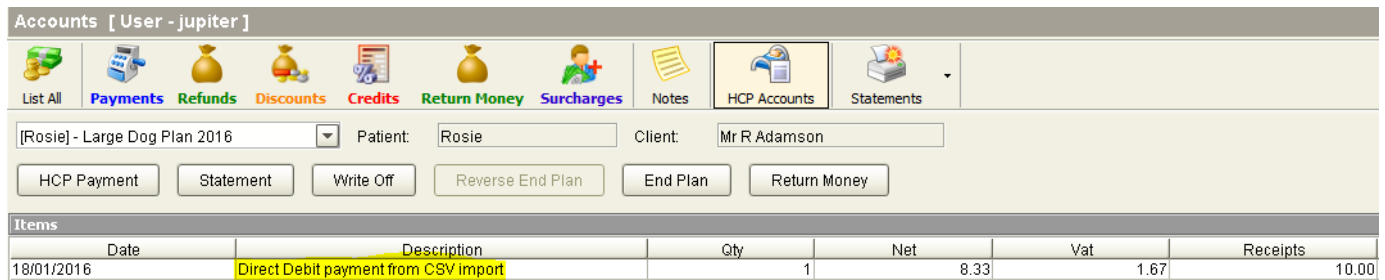Select the required file type from the drop down menu, then click 'Select File' button and find the CSV file to import for the specified month. Once happy that the correct file type and file has been selected, Click the Save button.

Once the file has been imported, you will see rows of successfully imported Direct Debit Payments.
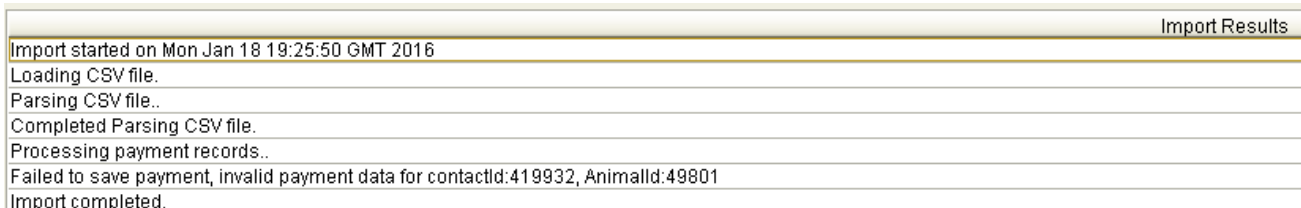

These payments are imported to the Client's HCP Account for the animal.

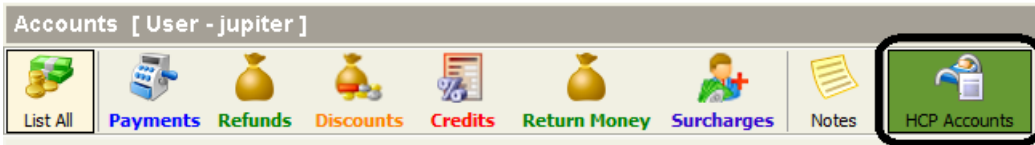Any errors will be shown in the grid such as the image below:

Upon errors, these must be attended to otherwise the payment information will not be imported for the affected records. The first step is to check the CSV file details are correct. If a record is incorrect, correct the problematic record and remove any successfully imported records from your CSV before re-importing to ensure that the successful records are not imported twice.

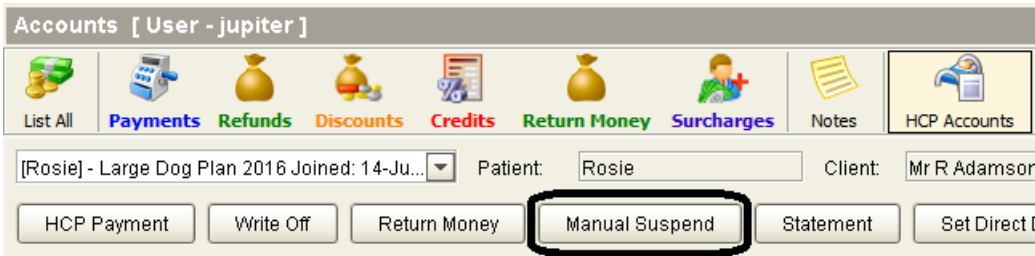If you require assistance, please contact Support.

Suspending a Plan

When a Client has not successfully paid the Direct Debit, the HCP administrator can suspend the plan for the animal. When the plan is suspended, the Client will no longer receive discounts on dispensed items from the Health Care Plan for that particular animal.
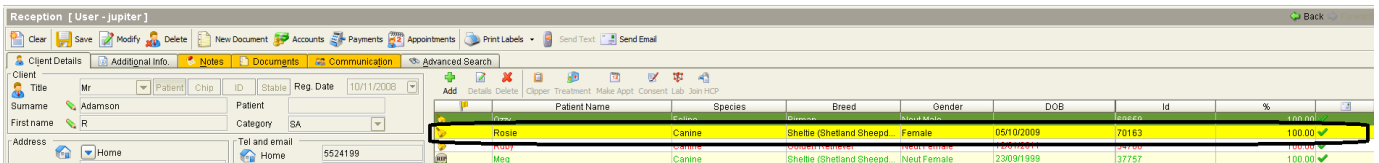
To Suspend a Plan, Enter the Accounts screen for the Client and select 'HCP Accounts'.

Here you will see a 'Manual Suspend' button. Select this button to suspend the plan.

Once suspended the patient will not be entitled to any discounts and the Patient will display in yellow to indicated a suspended plan.
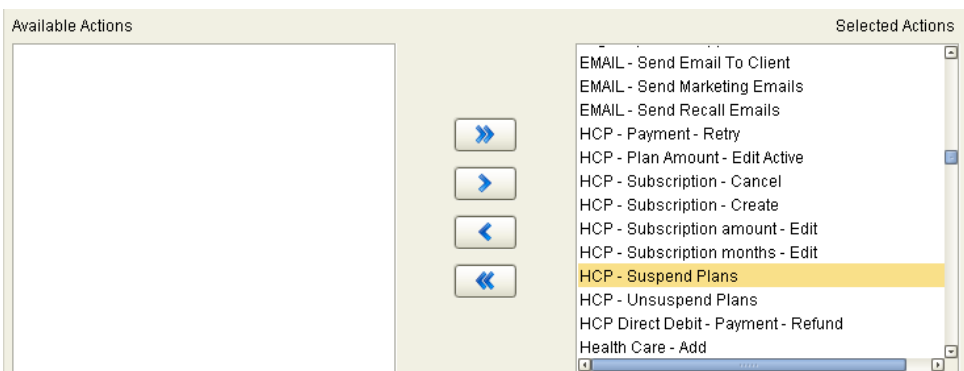

To re-activate the suspended plan, go back to the HCP Accounts screen.

You will notice the 'Suspend' button now reads 'Re-Activate'.

To un-suspend the plan select 'Re-activate'. Once the plan has been re-activated the HCP will continue to discount as before suspension and the patient will display in green.
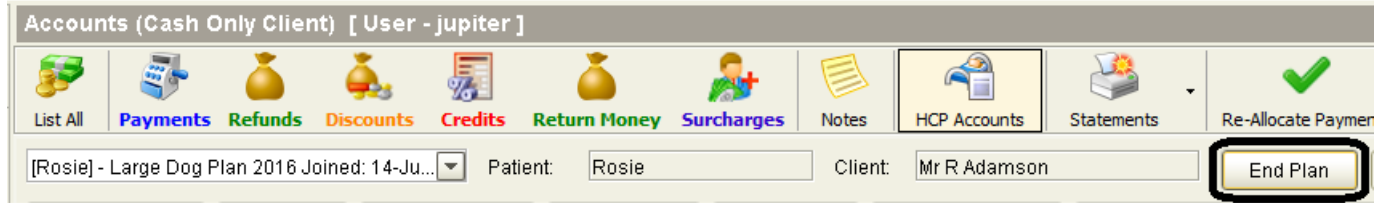
In order to suspend plans, users will need to have the HCP – Suspend Plans permission assigned (Utilities > System > Security > Roles).

Ending a Plan

To end a Health Care Plan, the Plan's balance has to have a zero
balance, this either needs to be done by a 'Final Payment', 'Return Payment' or by performing a 'Write Off' to
eliminate the remaining balance.

Once the plans balance is zero, you can end the plan. Enter the Client's Accounts screen and select 'HCP
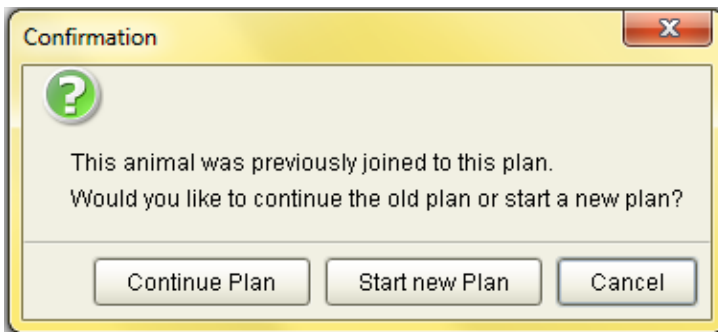Accounts'. Here you see the 'End Plan' button.

You need to manually notify your direct debit company of the plan ending so that they stop taking payments.

If you are ending the plan to join a different plan (Before the end of the current plan), then the current plan needs to
be ended, (as described above). in addition to this, you need to start the animal on the new plan. The new plan will
start from the beginning; it is not possible to push a start date to a past date.

 If your direct debit company stores the contact ID, animal ID and plan ID, you must update your direct debit
company of the new plan id, this also applies if you manually maintain the CSV import file (you must update the plan
id in the CSV file). If the plan ID is not updated, the wrong plans balance will be updated monthly.

If you would like to re-join the ended plan, go to the Reception Screen, select the Client, Select the Animal and
select 'Join HCP'. Once you attempt to join the previously joined Plan, you will see the following message:

Select 'Continue Plan' to re-join the previously ended Plan. If you wish to start a new plan, select 'Start new Plan'.

You can also re-instate a HCP from the HCP accounts screen as mentioned earlier in the document.

Cashing up HCP Payments

Health Care Plan financial transactions are separated from normal transactions. Therefore, when running daily cash, you have three different filter options under the filter 'Account Type' highlighted below.

If this is set to '**All**' all financial transactions will display, both HCP transactions and Non-HCP.

To run Non HCP transactions only select '**Non HCP**'.

To run for HCP transactions only, select '**HCP**'.