



# Health Care Plan Pt.4 - HCP Renewals

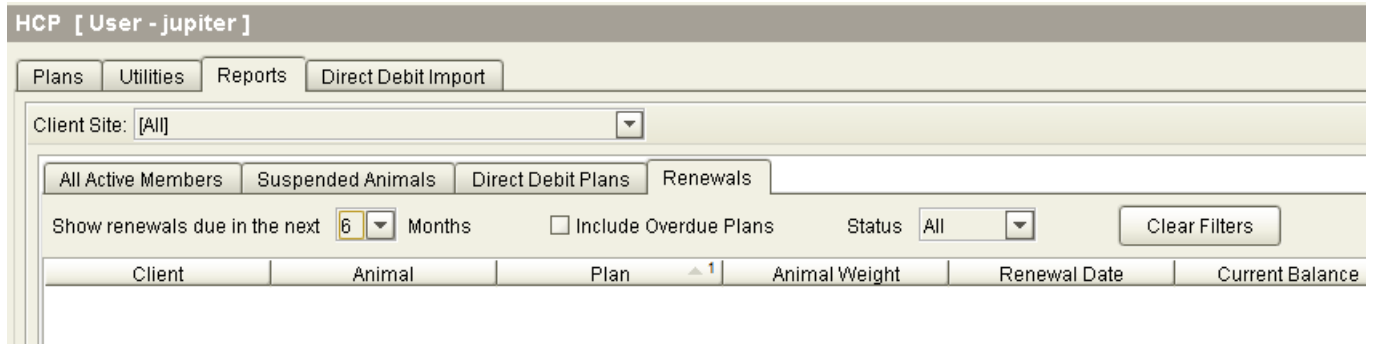
New Feature Documentation

## What does it do?

Health Plan Renewals is an Admin tool for Health plans that allows you to set what happens at the end of a Client's HCP.

## Where can I access it?

This screen can be accessed via Utilities > Health Care > Reports > Renewals Tab.



HCP [ User - jupiter ]

Plans Utilities Reports Direct Debit Import

Client Site: [All]

All Active Members Suspended Animals Direct Debit Plans Renewals

Show renewals due in the next 6 Months  Include Overdue Plans Status All Clear Filters

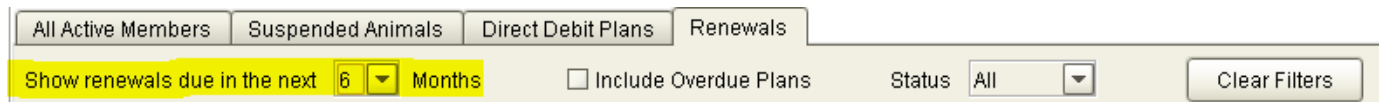
Client	Animal	Plan	Animal Weight	Renewal Date	Current Balance
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## How does it work?

### Filters

Use the filters options to generate a list of clients. The available filters are:

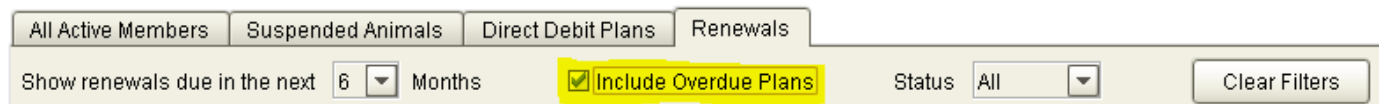
**1) Show renewals due in the next 'x' Months** – Select which plans expire in the next 'X' months.



All Active Members Suspended Animals Direct Debit Plans Renewals

Show renewals due in the next 6 Months  Include Overdue Plans Status All Clear Filters

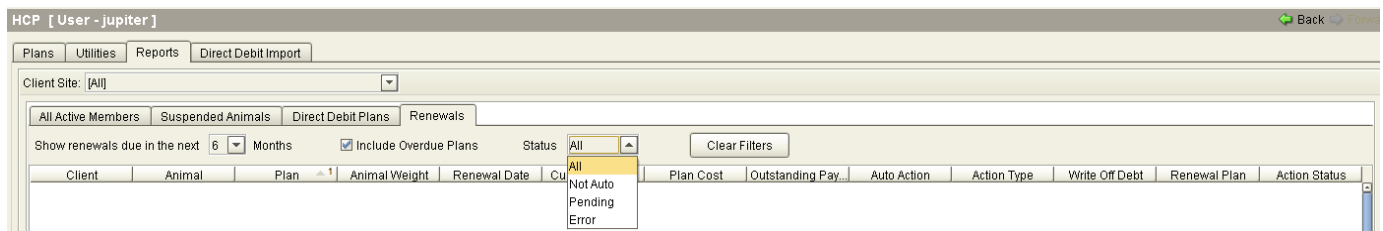
**2) Include Overdue Plans** – Tick this box if you want to also include plans that have expired.



All Active Members Suspended Animals Direct Debit Plans Renewals

Show renewals due in the next 6 Months  Include Overdue Plans Status All Clear Filters

**3) Status** – Filter by Renewal Status (All, Not Auto, Pending or Error).  
In the event of 'Error' please contact Voyager Support for assistance.



HCP [ User - jupiter ]

Plans Utilities Reports Direct Debit Import

Client Site: [All]

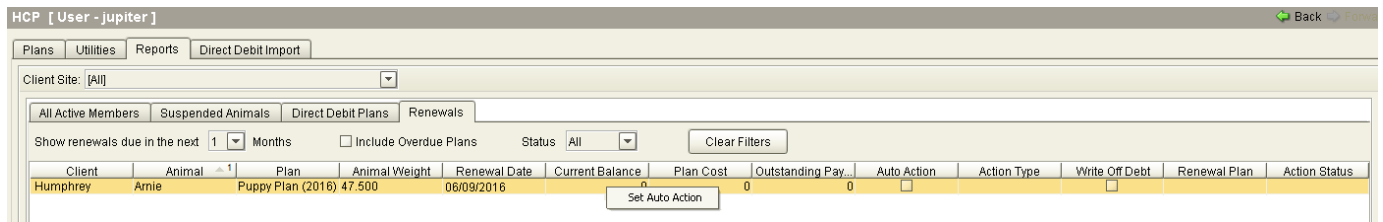
All Active Members Suspended Animals Direct Debit Plans Renewals

Show renewals due in the next 6 Months  Include Overdue Plans Status All Clear Filters

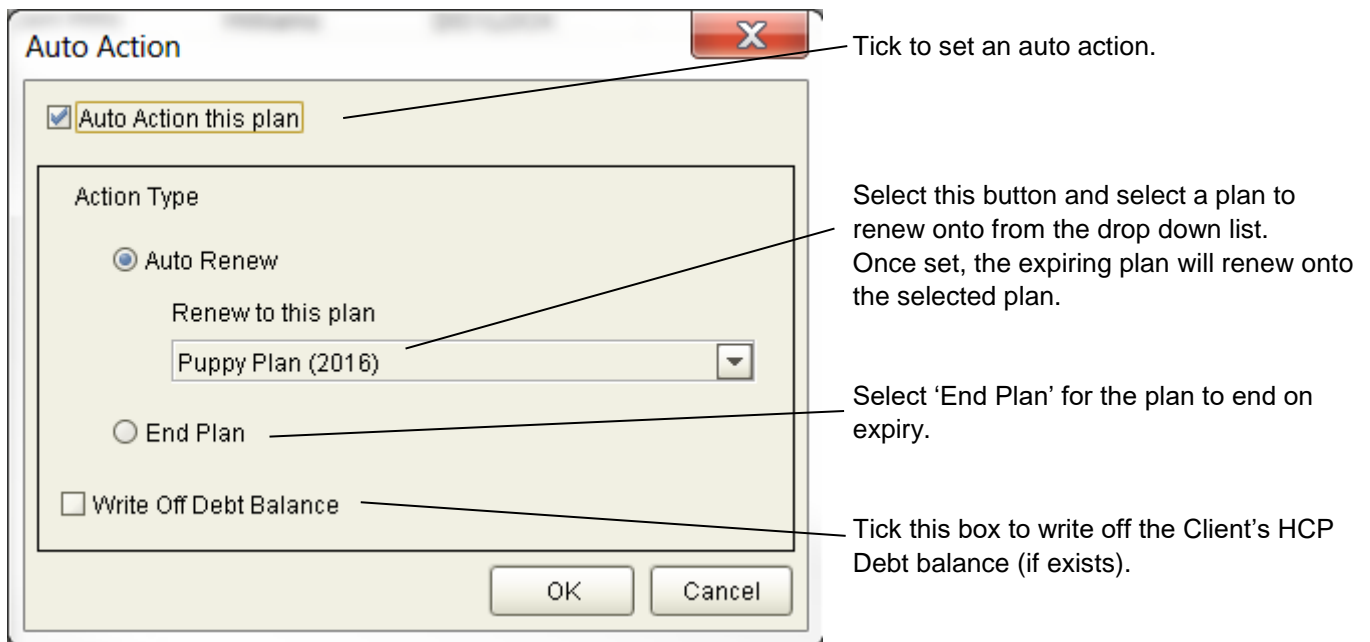
Client	Animal	Plan	Animal Weight	Renewal Date	Current Balance	Plan Cost	Outstanding Pay...	Auto Action	Action Type	Write Off Debt	Renewal Plan	Action Status
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## Setting a plan to renew

Once you have loaded data, right click on a patient and the option 'Set Auto Action' will appear.



Selecting 'Set Auto Action' will bring up the following window:



You can then view the Client's renewal details from the renewals grid. The example below shows they will be renewed onto the same plan, the status is pending as the renewal date has not passed as of yet.

Client	Animal	Plan	Animal Weight	Renewal Date	Current Balance	Plan Cost	Outstanding Pay...	Auto Action	Action Type	Write Off Debt	Renewal Plan	Action Status
Humphrey	Arnie	Puppy Plan (2016)	47.500	06/09/2016	0	0	0	<input checked="" type="checkbox"/>	Renew Plan	<input type="checkbox"/>	Puppy Plan (2016)	Pending