



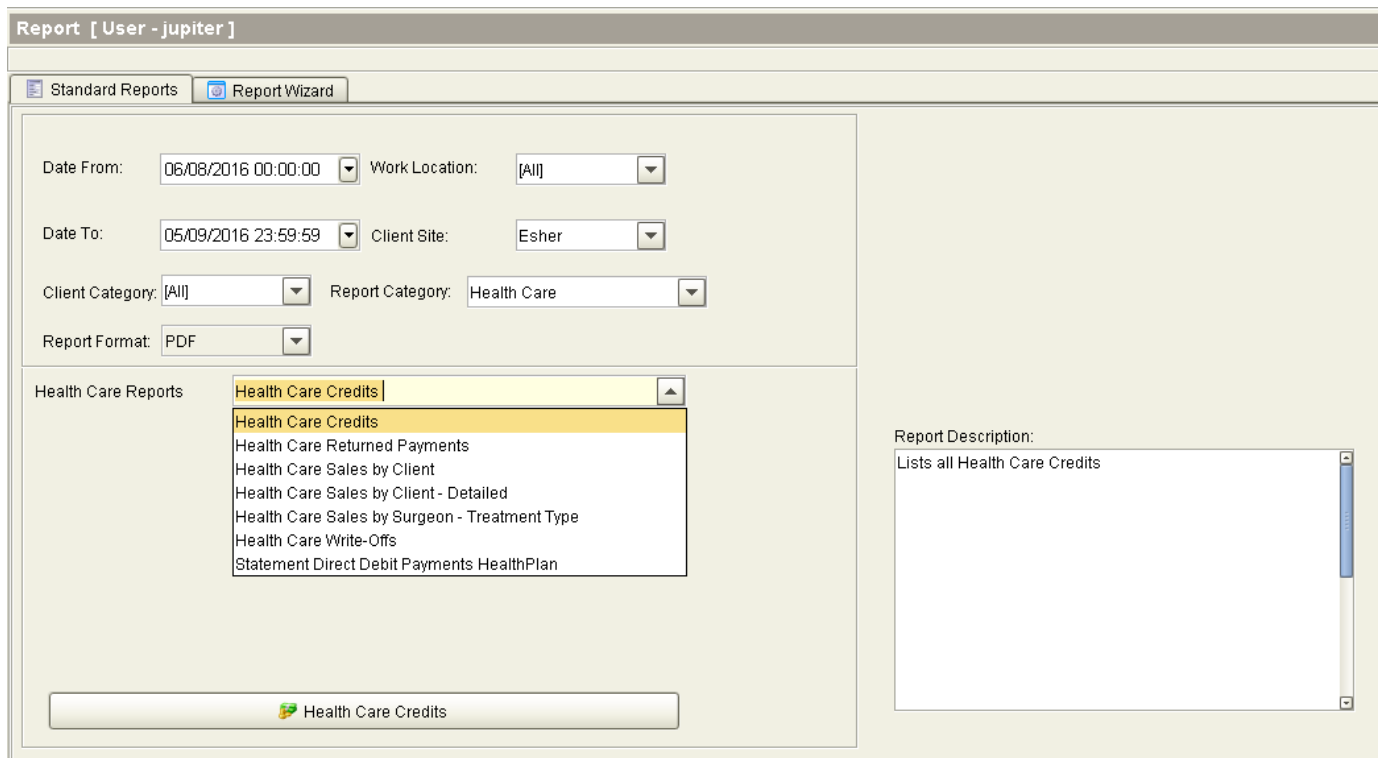
Health Care Plan Pt.5 - HCP Reporting

New Feature Documentation

What does it do?

In Marketing > Reports > Standard reports, you will find a report category called 'Health Care Plan'.

This category contains a range of reports regarding Health Care Plans.



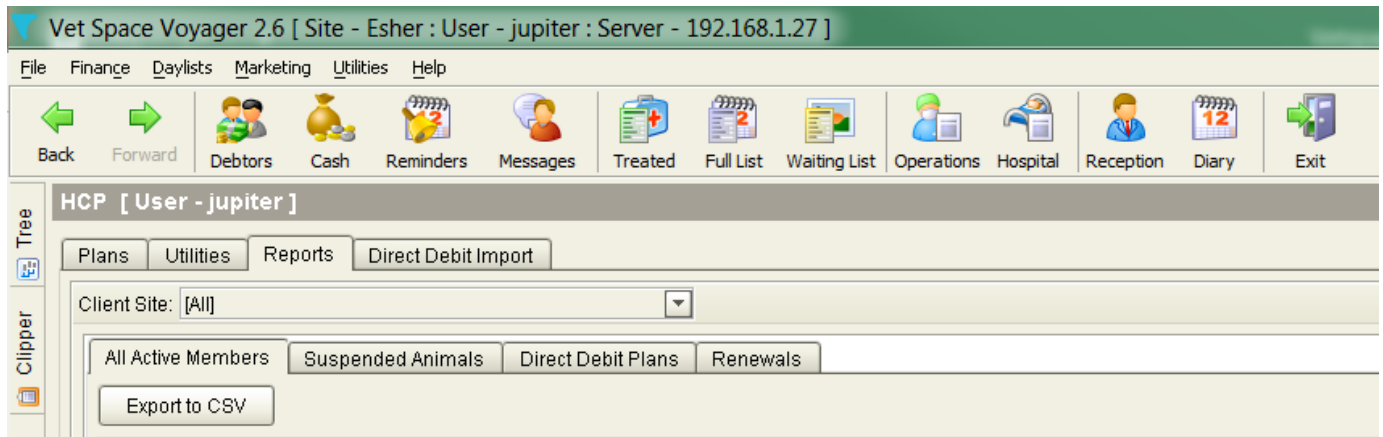
The screenshot shows the 'Report Wizard' interface for generating a report. The 'Report Category' is set to 'Health Care'. The 'Health Care Reports' list includes 'Health Care Credits', 'Health Care Returned Payments', 'Health Care Sales by Client', 'Health Care Sales by Client - Detailed', 'Health Care Sales by Surgeon - Treatment Type', 'Health Care Write-Offs', and 'Statement Direct Debit Payments HealthPlan'. The 'Report Description' for 'Health Care Credits' is 'Lists all Health Care Credits'.

What Standard Reports can I generate?

Report	Data produced
Health Care Credits	Credits allocated to Health Care items within dates specified.
Health Care Returned Payments	Returned Healthcare payments within dates specified.
Health Care Sales by Client	Healthcare sales within dates specified. Data grouped by Client displaying dates, Invoice numbers, Net, VAT & Totals.
Health Care Sales by Client - Detailed	Healthcare sales within dates specified. Data grouped by Client displaying dates, Qty & Item Description, Net-Net, Net-Net-Net, Net, VAT & Totals.
Health Care Sales by Surgeon - Treatment Type	Healthcare sales within dates specified. Data grouped by Surgeon displaying dates, Qty & Item Description, Net-Net, Net-Net-Net, Net, VAT & Totals.
Health Care Write-Offs	Write-offs against Health Care balances within dates specified.
Statement Direct Debit Payments Health Plan	Lists all Direct Debit Payments with future payments included, for an instance of an animal in a Health care plan

What HCP Reports can I generate?

You can also generate reports from Utilities > Health Care > Reports Tab.



Report	Data produced
All Active Members	Lists all active Health Care Plan members, you can export this list as a CSV.
Suspended Animals	Lists all suspended Health Care Plan members, you can export this list as a CSV.
Direct Debit Plans	Lists all Direct debit plans and provides payment details. Allows you to filter by Plan and Direct debit status. you can export this list as a CSV.
Renewals	Lists all health care plans that are due for renewal in the time frame set.