



Health Care Plan Improvements

2.7 New Feature Documentation









What does it do?



Following the release of our new Health Care Plan in 2014 and improvements in 2016, we are introducing further improvements in 2017 based on feedback of existing functionality.

Day lists to incorporate the icon for HCP












Users can now easily identify health care plan members from the day list screens with a simple icon. This is applicable to the Waiting, Treated, Full, Operations and Hospital Lists.

Full List [User - jupiter]

 Arrived
  Memo
  Delete
  Accounts
  Payments
  Make Appt
  Surgeon
  Refresh

From To

 Surgeon

Full List

		Date	Time	Length	Client	Patient
1		23/12/2016	00:00	0	Hunter	Peter
2		23/12/2016	00:00	0	Jones	Felix
3		23/12/2016	00:00	0	Kearns	Molly
4		23/12/2016	00:20	0	Morley	Chloe
5		23/12/2016	00:40	0	Hunter	Peter
6		23/12/2016	01:00	0	Morley	Chloe
7		23/12/2016	01:20	0	Fuller	Susie
8		23/12/2016	01:40	0	King	Jenny
9		23/12/2016	02:00	0	King	Jenny
10		23/12/2016	07:30	40	Jones	Felix











HCP Accounts Colour Scheme - Active/Suspended plans

User can now identify active/suspended health care plans when selecting the HCP account from the drop down list.

Green = Active

Yellow = Suspended

Accounts [User - jupiter]

 List All
  Payments
  Refunds
  Discounts
  Credits
  Return Money
  Surcharges
  Notes
  HCP Accounts
  Statements

Items

Date	Description	Qty	Net	Vat	Receipts
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Health Care Plan Tab Colour

The HCP Tab in the Treatment screen will now show the status of the plan with the background colour.

The tab will show as green for active plans.



Yellow for suspended plans.



Standard background colour if the animal is not on a Health Care Plan.



Selected Animal to show the HCP background colour

When selecting an animal in reception the HCP colouring is not show so the user cannot see if the animal is on a plan. When selected allow the background colour to be represented such as a different shade of green.

Health Care Plan – Equivalent Quantity Multiplier

To resolve the potential issue of over prescription for some drugs on the health care plan in the same Category, we have introduced an Equivalent Quantity Multiplier (EQM).

The EQM is available for each code and will allow a single quantity of this product to be multiplied in the number used on a health care plan.

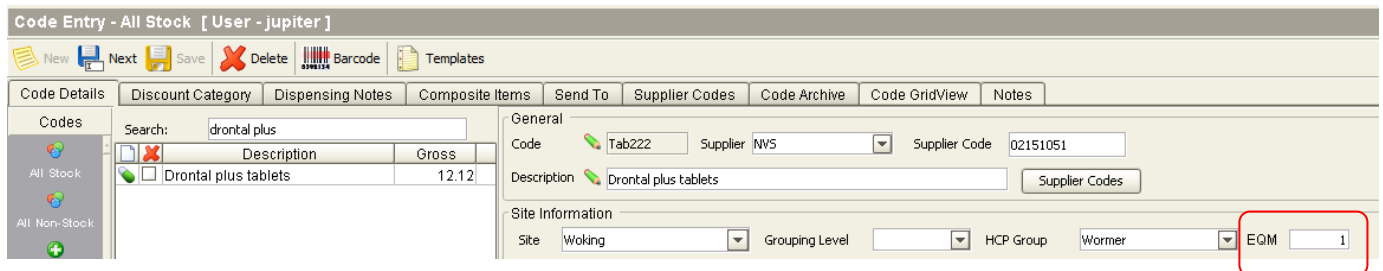
Example Product	Quantity Charged	EQM	Total Used in Plan
Advocate 3pk	1	1	1
Advocate 3pk	2	1	2
Advocate 6pk	1	2	2
Advocate 6pk	2	2	4
Bravecto	1	3	3
Bracecto	2	3	6

The EQM will not affect stock levels or amount dispensed, it will only be used for multiplying the number of products used in the health care plan category.

Example of the Number Available and Used below:

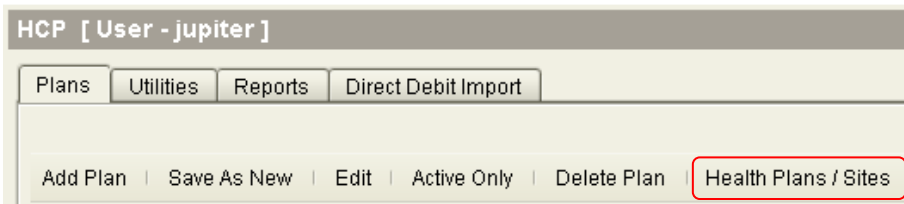
Description	Discount Percentage	Number Available	Used
Consultations	100.0	1.0	1.0
Diets	10.0	9999998.0	1.0

The EQM is set in Utilities > Code Entry. Once you have selected a code, you can select a category and set an EQM for the code.

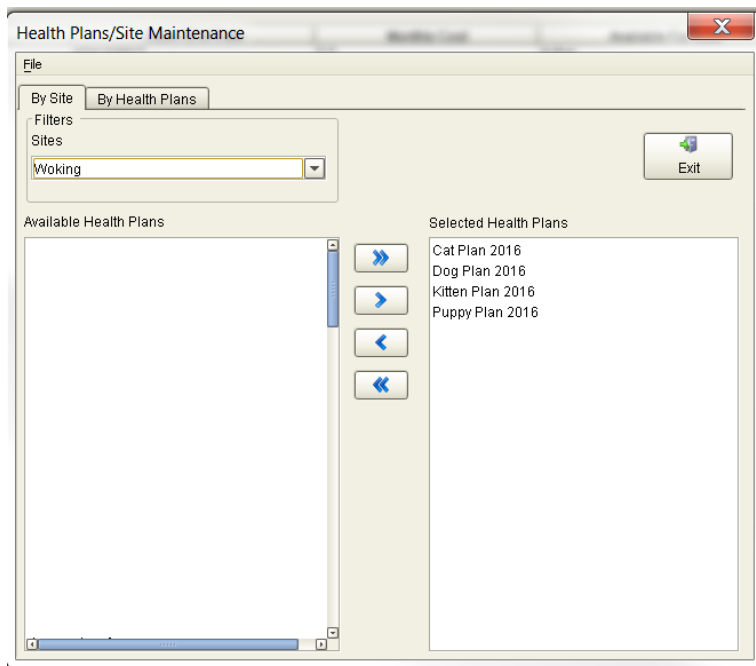


The screenshot shows the 'Code Entry - All Stock [User - jupiter]' window. The 'Site Information' section is highlighted with a red box, showing the 'EQM' field set to '1'. Other fields in the 'Site Information' section include 'Site' (Woking), 'Grouping Level', 'HCP Group' (Wormer), and 'Supplier Codes'.

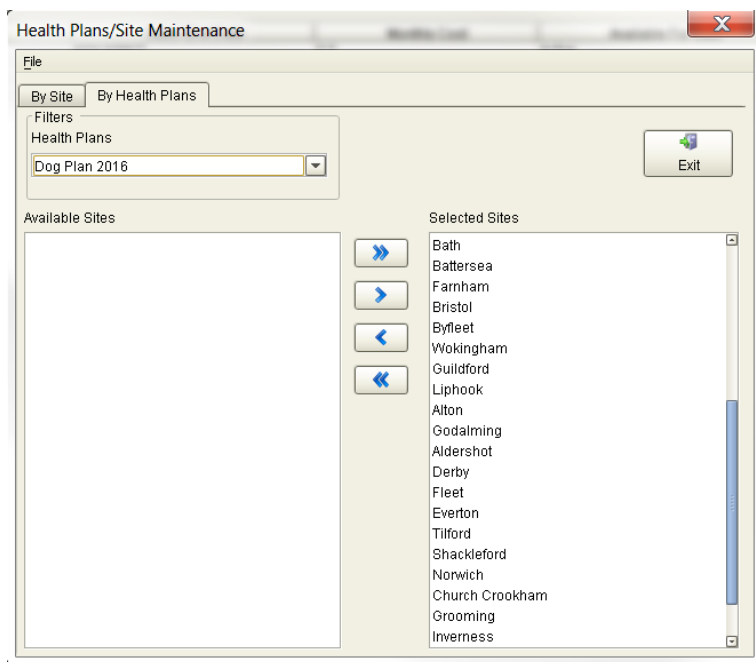
You are now able to limit plans to selected sites. When a plan is created, by default it is available to all sites. To restrict the availability of HCP's at specific sites, this can be maintained using the Health Plans / Sites functionality.




Once selected, the below window will appear. Select a site from the drop-down list and use the arrows provided to assign/un-assign health care plans to sites.



Alternatively, use the 'By Health Plans' tab to assign Health Care Plans to sites. Select a Health Care Plan from the drop-down list and use the arrows provided to assign/un-assign to sites.



When viewing Health Care Plans, you can now filter by Site so that only relevant Health Care Plans are displayed.



Health Plan Id	Description	Sales Start Date	Sales End Date	Monthly Cost	Active
8731	Cat Plan 2016	07/12/2016	07/12/2017	0.0	Active
8733	Dog Plan 2016	21/12/2016	21/12/2017	10.0	Active
1142	Kitten Plan 2016	22/01/2016	22/01/2017	8.33	Active
8732	Puppy Plan 2016	08/12/2016	08/12/2017	12.0	Active

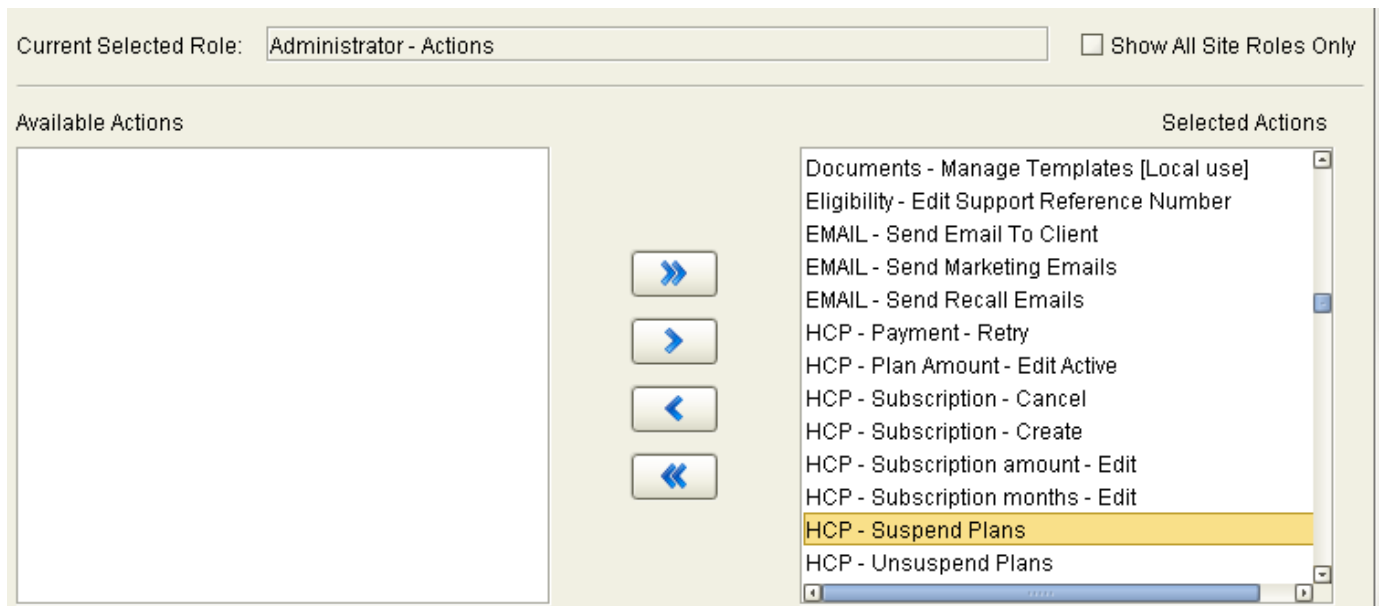
Site: (Dropdown menu includes: Woking, Aston, Oxford, Basingstoke, Bath, **Battersea**, Farnham, Bristol)

User Permissions Suspending plans

User permissions have been added for Suspending and unsuspending plans. Therefore, only users with this permission can perform the suspension/un-suspension of a plan.

Previously a single action existed for both suspend and unsuspend.

This role can be assigned/unassigned via Utilities > System > security > User Roles.



Current Selected Role: Show All Site Roles Only

Available Actions

Selected Actions

- Documents - Manage Templates [Local use]
- Eligibility - Edit Support Reference Number
- EMAIL - Send Email To Client
- EMAIL - Send Marketing Emails
- EMAIL - Send Recall Emails
- HCP - Payment - Retry
- HCP - Plan Amount - Edit Active
- HCP - Subscription - Cancel
- HCP - Subscription - Create
- HCP - Subscription amount - Edit
- HCP - Subscription months - Edit
- HCP - Suspend Plans**
- HCP - Unsuspend Plans