

# Treatment Groups

23/10/2024 4:02 pm BST

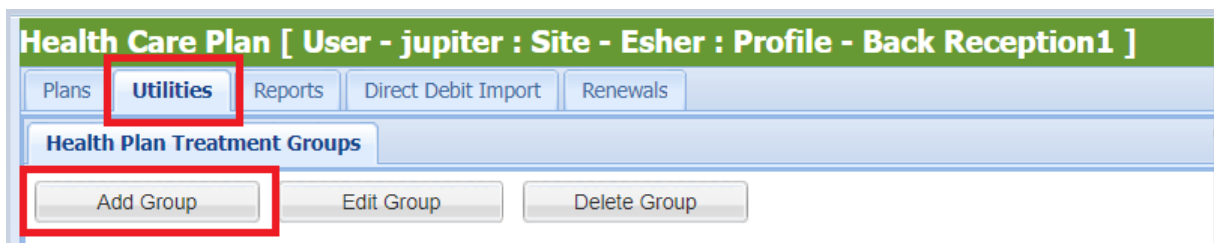
## Summary

The first step of setting up your Health Care Plans is to configure your Treatment Groups. Treatment groups handle the discounting of dispensed items for HCP Patients.

## Details

### Adding Health Plan Treatment Groups

1. Navigate to the HCP Treatment Groups screen ( Administration > Health Care > Utilities). Your Health Plan Treatment Groups will be shown here.
2. To add a new group, select '**Add Group**'

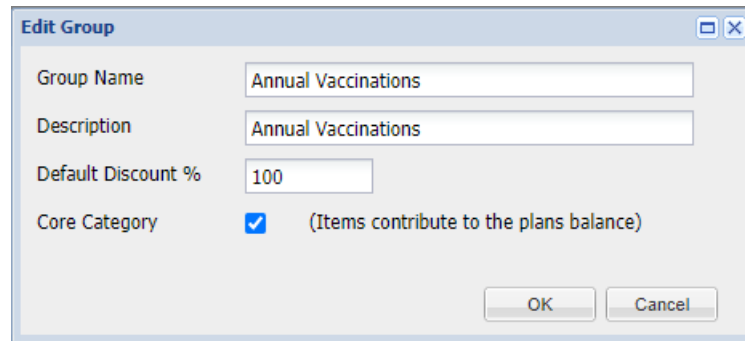


3. The following screen will show, prompting you for the following information:

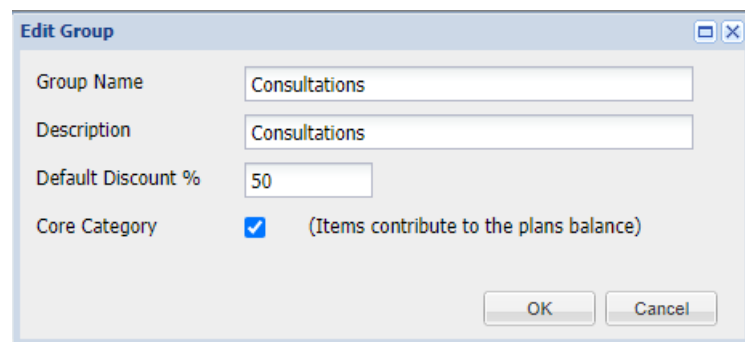
A screenshot of a dialog box titled 'Edit Group'. It has a standard window frame with minimize, maximize, and close buttons in the top right corner. The dialog contains four input fields: 'Group Name' (a text box), 'Description' (a text box), 'Default Discount %' (a text box containing the value '0'), and 'Core Category' (a checkbox). To the right of the 'Core Category' checkbox is the text '(Items contribute to the plans balance)'. At the bottom right of the dialog are two buttons: 'OK' and 'Cancel'.

4. **Group Name**  
= Name of the Treatment Group.
5. **Description** = Description of the Treatment Group  
**Default Discount** = Default discount percentage amount  
**Core Category** = Tick to set this treatment group as a Core Category
6. Select 'OK' to add the group.

For example, in the screenshots below, we 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'.

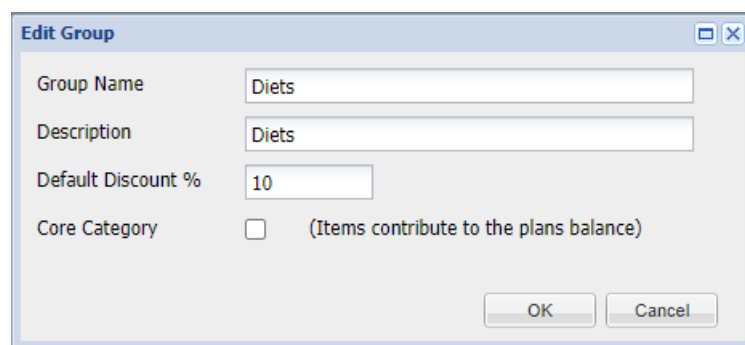


The 'Edit Group' dialog box for 'Annual Vaccinations' shows the following fields: 'Group Name' and 'Description' both containing 'Annual Vaccinations', 'Default Discount %' set to '100', and 'Core Category' checked with the note '(Items contribute to the plans balance)'. 'OK' and 'Cancel' buttons are at the bottom right.



The 'Edit Group' dialog box for 'Consultations' shows the following fields: 'Group Name' and 'Description' both containing 'Consultations', 'Default Discount %' set to '50', and 'Core Category' checked with the note '(Items contribute to the plans balance)'. 'OK' and 'Cancel' buttons are at the bottom right.

The example below show the setup of a Treatment group for discounting Diets with default discounts of 10%. This is a non-core item.



The 'Edit Group' dialog box for 'Diets' shows the following fields: 'Group Name' and 'Description' both containing 'Diets', 'Default Discount %' set to '10', and 'Core Category' unchecked. The note '(Items contribute to the plans balance)' is present but not active. 'OK' and 'Cancel' buttons are at the bottom right.

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

Health Plan Treatment Groups		
<div> Add Group Edit Group Delete Group </div>		
Name	Default Discount Percentage	Core Category
Consultations	50	<input checked="" type="checkbox"/>
Diets	10	<input type="checkbox"/>
Flea Treatment	100	<input checked="" type="checkbox"/>
Vaccinations	100	<input checked="" type="checkbox"/>
Wormer	100	<input checked="" type="checkbox"/>

## Editing Treatment Groups

If you would like to edit a Treatment group:

1. **Select the the group** you would like to edit and select '**Edit Group**'.
2. The 'Edit Group' window will display allowing you to change the Group Name, Description, Default Discount % or Core Category previously entered.

Edit Group

Group Name
Flea Treatment

Description
Flea Treatment

Default Discount %
100

Core Category
☒ (Items contribute to the plans balance)

OK
Cancel

3. Make your changes and select '**OK**' to save the changes.

## Deleting Treatment Groups

To delete a Treatment Group:

1. **Select the group** from the Treatment Group Grid.
2. Select the '**Delete Group**' button.

NB It will not be possible to delete a group if it has assigned treatments in code entry.

## Assigning Treatment Groups to Codes

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

For more information, see: [HCP Code Maintenance](#)

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