

Creating Plans

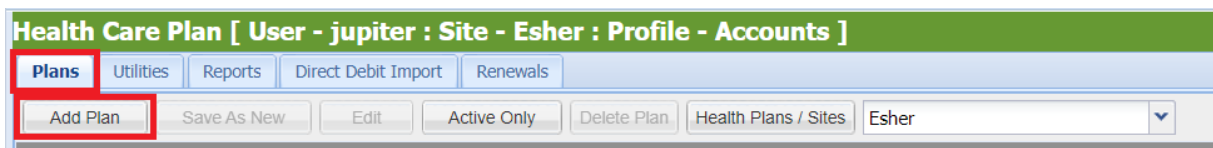
23/10/2024 4:03 pm BST

Summary

Once you have created your treatment groups and assigned the relevant groups to your codes in Code Entry, you are able to setup your Health Care Plans.

Add a Health Care Plan

1. From the Main Toolbar select '**Health Care**' from the 'Administration' Menu.
2. Select the '**Add Plan**' button.



3. The "Plan Admin" screen will display

A screenshot of the "Plan Admin" screen within the same software interface. The title bar remains the same. Below the menu bar, there is a "View Plans" icon and label. The "Plan Details" section contains several input fields: "Description:", "Plan to Replace:" (a dropdown menu), "Species:" (a dropdown menu), "Short Description:", "Plan Colour:" (a color selection dropdown showing green), "Monthly Cost:" (a text box with "0.00"), "Start Date:" (a date picker showing "02/10/2024"), "Plan Length (Months):" (a text box with "12"), "End Date:" (a date picker showing "02/10/2025"), and "Total Cost:" (a text box with "0.00"). There is also a checkbox labeled "Active" which is checked. "Clear" and "Save" buttons are at the bottom right of this section. Below the "Plan Details" is a section titled "Available Treatment Groups" with a list of items: "1 Flea", "2 Worm", "3 Nail Clips", "4 Diets", "5 Vaccinations", and "6 Primary Vaccs". Each item has a "Default Discount Percentage" listed below it. To the right of this list is a "Plan Contents" area, which is currently empty.

4. Enter your plan details:

Description = Name of the plan.

Plan to replace = Select a plan from the list if you are replacing an existing plan.

Species = Specify a species if the plan is species specific.

5. Enter your short code for the plan and the plan colour: (Raise a ticket with support for this)

Short Description = Add a short code for the plan, which shows in the summary bar.

Plan Colour = Can add a plan specific colour

6. Enter your plan's cost details:

Monthly Cost = The plan's monthly fee.

Plan Length = The length of the plan (months).

Total Cost = This is auto-calculated using the above figures.

7. Enter the plans activation details

Start Date = When patients can join the HCP

End Date = When to stop patients from being able to join the HCP

Active = If ticked, the plan is active and ready for Patients to join.

8. Select '**Save**' to save the HCP.

Assign Treatment Groups to Health Care Plans

Once you have created your plan, the final step is to assign your Treatment Groups to the Health Care Plan.

1. From the Plan Admin Screen you will see a list of available treatment groups on the left-hand side.
2. To assign these groups to the Health Care Plan, simply drag them from the Available Treatment Groups section and drop them into the Plan Contents Section on the right.

The screenshot displays a two-pane interface for managing health care plans. The left pane, titled 'Available Treatment Groups', contains a list of six items, each with a green header and a white body showing the default discount percentage:

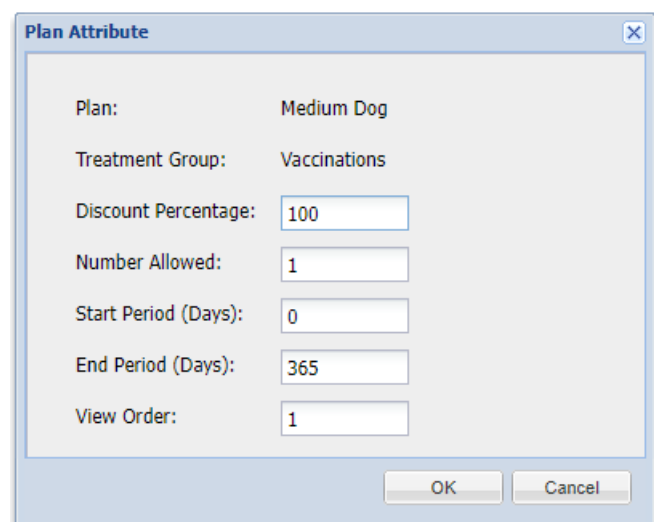
- 1 Flea: Default Discount Percentage: 100%
- 2 Worm: Default Discount Percentage: 100%
- 3 Nail Clips: Default Discount Percentage: 50%
- 4 Diets: Default Discount Percentage: 25%
- 5 Vaccinations: Default Discount Percentage: 100%
- 6 Primary Vaccs

The right pane, titled 'Plan Contents', shows three treatment groups assigned to the plan, each with a blue header and a white body containing configuration details and 'Edit'/'Delete' buttons:

- Microchip**: Discount Percentage: 100% Number Allowed: 1, Start Period (Days): 0 End Period (Days): 0
- Vaccinations**: Discount Percentage: 100% Number Allowed: 1, Start Period (Days): 0 End Period (Days): 0
- Vet Consultations**: Discount Percentage: 100% Number Allowed: 3, Start Period (Days): 0 End Period (Days): 365

3. Once the Treatment Group has been dragged into the Plan Contents column, the Plan

Attribute screen will display.



The image shows a 'Plan Attribute' dialog box with a title bar containing a close button. The dialog contains several fields with labels and values:

Field	Value
Plan:	Medium Dog
Treatment Group:	Vaccinations
Discount Percentage:	100
Number Allowed:	1
Start Period (Days):	0
End Period (Days):	365
View Order:	1

At the bottom right of the dialog are two buttons: 'OK' and 'Cancel'.

Now specify the following:

Discount Percentage - The amount of discount to be applied when dispensing a code with the Treatment Group allocated.

Number Allowed - The number of discounted items the animal can have from the Treatment Group.

Start Period - After how many days of joining the HCP the animal is entitled to the Treatment Group discount.

End Period - After how many days of joining the HCP where the animal stops receiving the discount.

View Order - Sets which order the group shows on the Plan Contents column.

4. Once you have set your attributes, select '**OK**'. This will add the treatment group to the Plan Contents Column.

These attributes can be edited or deleted using the buttons provided. Continue these steps for each plan attribute and finalise with 'Save'.
