

Renewals

14/05/2025 10:37 am BST

Summary

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

This screen can be accessed via the Health Care Screen.

Details

View Expiring Plans

1. Navigate to Administration > Health Care > Renewals

Health Care Plan [User - jupiter : Site - Esher : Profile - Back Reception]

Plans Utilities Reports Direct Debit Import **Renewals**

Show renewals due in the next 1 Months ☐ Include Overdue Plans Status All Client Site [All] Plan [All] Export to CSV

Clear Filters Select All Assign Action

| Client | Animal | Plan | Animal Weight | Renewal Date | Current Bala... | Plan Cost | Outstanding Paym... | Auto Action | Action Type | Write Off Debt | Renewal Plan | Action Status |
|--------|--------|------|---------------|--------------|-----------------|-----------|---------------------|-------------|-------------|----------------|--------------|---------------|
|--------|--------|------|---------------|--------------|-----------------|-----------|---------------------|-------------|-------------|----------------|--------------|---------------|

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

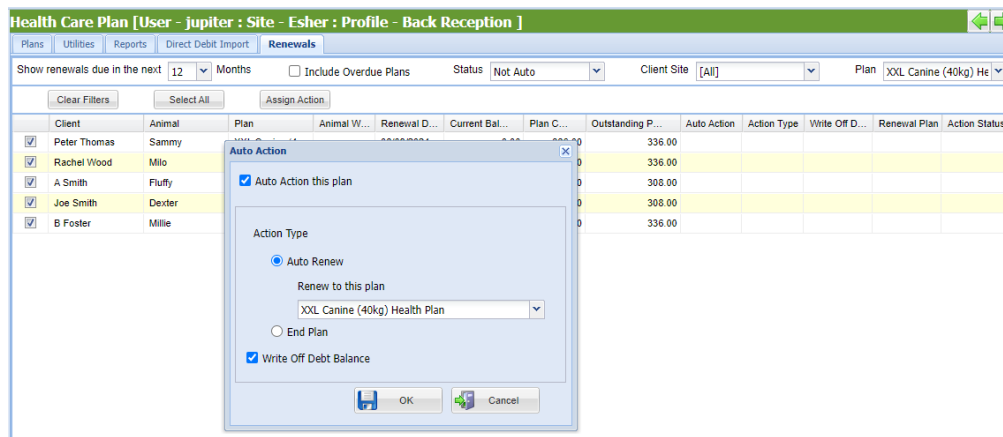
Show renewals due in the next 'X' Months = Select which plans expire in the next 'X' months.

Include Overdue Plans = Tick this box if you want to also include plans that have expired.

Status = Filter by Renewal Status (All, Not Auto, Pending or Error). In the event of 'Error' please contact MWI Technology Support for assistance.

Selecting Multiple Plans to End/Renew

1. Select the required filters but always select by plan, and status "Not Auto", recommended. Now select the "Select All" button which puts a tick in all plans within the "selected plan). Select "Assign Action".
2. The Auto Action window will display.



3. Tick 'Auto Action this plan'.
4. Select 'Auto-Renew' and select a plan to renew onto from the drop down list.
5. Select 'Write Off Debt Balance'.
6. Select 'OK' to save. The plans will renew to the specified plan once expired.

NB Always remember to periodically tick the “Include Overdue Plans” box just in case there have been any errors in the automatic renewal procedure.

| Health Care Plan [User - jupiter : Site - Esher : Profile - Back Reception1] | | | | | | | | | | | | | |
|--|--------|------------|-------------|---------------|----------------|--|------------------|-------------|-------------|----------------|--------------|----------------------|--|
| Plans | | Utilities | | Reports | | Direct Debit Import | | Renewals | | | | | |
| Show renewals due in the next | | 12 | | Months | | <input type="checkbox"/> Include Overdue Plans | | Status | | Not Auto | | Client Site | |
| Clear Filters | | Select All | | Assign Action | | | | | | | | Plan | |
| | | | | | | | | | | | | XXL Canine (40kg) He | |
| Client | Animal | Plan | Animal W... | Renewal D... | Current Bal... | Plan C... | Outstanding P... | Auto Action | Action Type | Write Off D... | Renewal Plan | Action Status | |
| <input checked="" type="checkbox"/> Peter Thomas | Sammy | | | | | | 336.00 | | | | | | |
| <input checked="" type="checkbox"/> Rachel Wood | Milo | | | | | | 336.00 | | | | | | |
| <input checked="" type="checkbox"/> A Smith | Fluffy | | | | | | 308.00 | | | | | | |
| <input checked="" type="checkbox"/> Joe Smith | Dexter | | | | | | 308.00 | | | | | | |
| <input checked="" type="checkbox"/> B Foster | Millie | | | | | | 336.00 | | | | | | |

Export as CSV

It is possible to export the renewals list as a CSV using the button provided.