

# Creating Plans

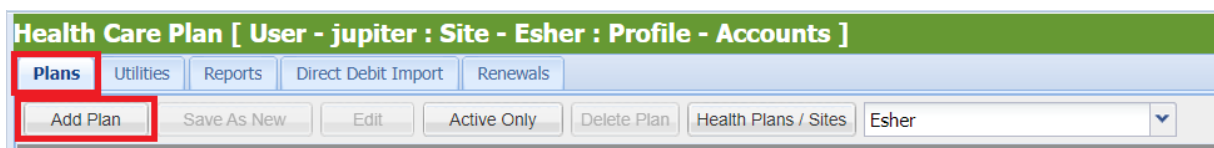
19/11/2025 4:44 pm GMT

## 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

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: (To enable this feature, go to Administration/Settings/Reception and click "Enable HCP Colour".)

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 the Plan Admin interface. On the left, under 'Available Treatment Groups', there is a list of six items: 1 Flea (100% discount), 2 Worm (100% discount), 3 Nail Clips (50% discount), 4 Diets (25% discount), 5 Vaccinations (100% discount), and 6 Primary Vaccs. On the right, under 'Plan Contents', three items have been assigned: Microchip (100% discount, 1 allowed), Vaccinations (100% discount, 1 allowed), and Vet Consultations (100% discount, 3 allowed). Each assigned item has 'Edit' and 'Delete' buttons.

Available Treatment Groups	Plan Contents
1 Flea Default Discount Percentage: 100%	Microchip Discount Percentage: <b>100%</b> Number Allowed: <b>1</b> Start Period (Days): <b>0</b> End Period (Days): <b>0</b>
2 Worm Default Discount Percentage: 100%	Vaccinations Discount Percentage: <b>100%</b> Number Allowed: <b>1</b> Start Period (Days): <b>0</b> End Period (Days): <b>0</b>
3 Nail Clips Default Discount Percentage: 50%	Vet Consultations Discount Percentage: <b>100%</b> Number Allowed: <b>3</b> Start Period (Days): <b>0</b> End Period (Days): <b>365</b>
4 Diets Default Discount Percentage: 25%	
5 Vaccinations Default Discount Percentage: 100%	
6 Primary Vaccs	

3. Once the Treatment Group has been dragged into the Plan Contents column, the Plan Attribute screen will display.

Plan Attribute

Plan: Medium Dog

Treatment Group: Vaccinations

Discount Percentage: 100

Number Allowed: 1

Start Period (Days): 0

End Period (Days): 365

View Order: 1

OK 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'.

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