Renewals

04/09/2025 2:22 pm BST

Summary

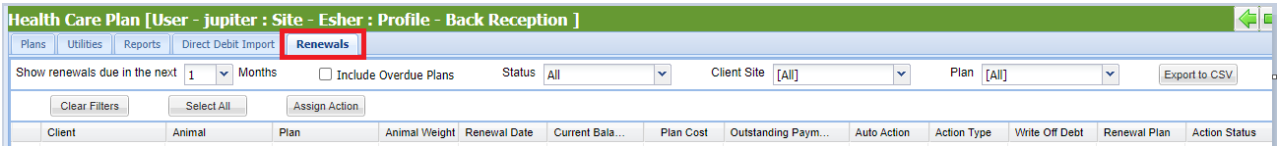
Health Plan Renewals is an Admin tool for Health Pans that allows you to set what happens at the end of a patient's HCP.

This screen can be accessed via the Health Care screen.

Details

View Expiring Plans

1. Navigate to Administration > Health Care > Renewals



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

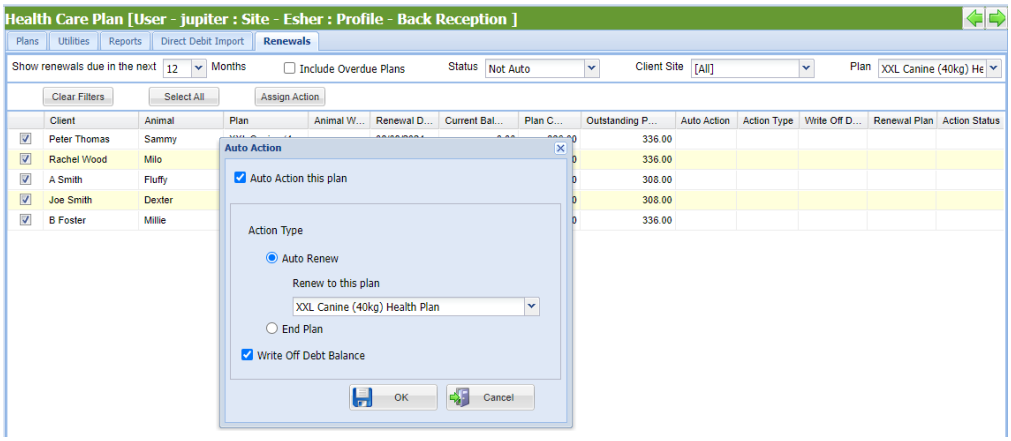
   Show renewals due in the next 'x' Months = Select which plans expire in the next 'X' months.

   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.

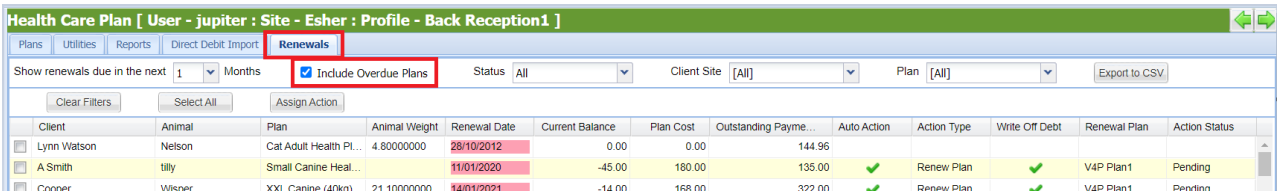
Selecting Multiple Plans to End/Renew

1. Select the required filters but always select by plan and select Status of "Not Auto" recommended. Now select the "Select All" button which places 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.



Export as CSV

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