

# Using HCPs

23/10/2024 4:04 pm BST

## Summary

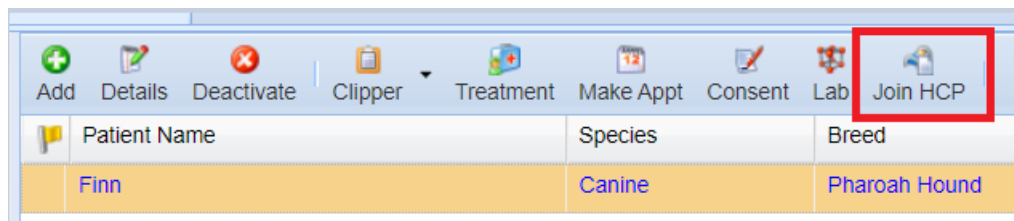
The HCP module is integrated into the main treatment screen, automatically discounting and dispensing items from the plan.

This page documents the following day-to-day processes:

- Joining a Health Care Plan
- Taking the initial payment
- Identifying a HCP Patient
- Dispensing Items
- Viewing a Patient's HCP Entitlements

## Joining a Health Care Plan

1. Search and Select a Patient from Reception
2. Select the “Join HCP” button



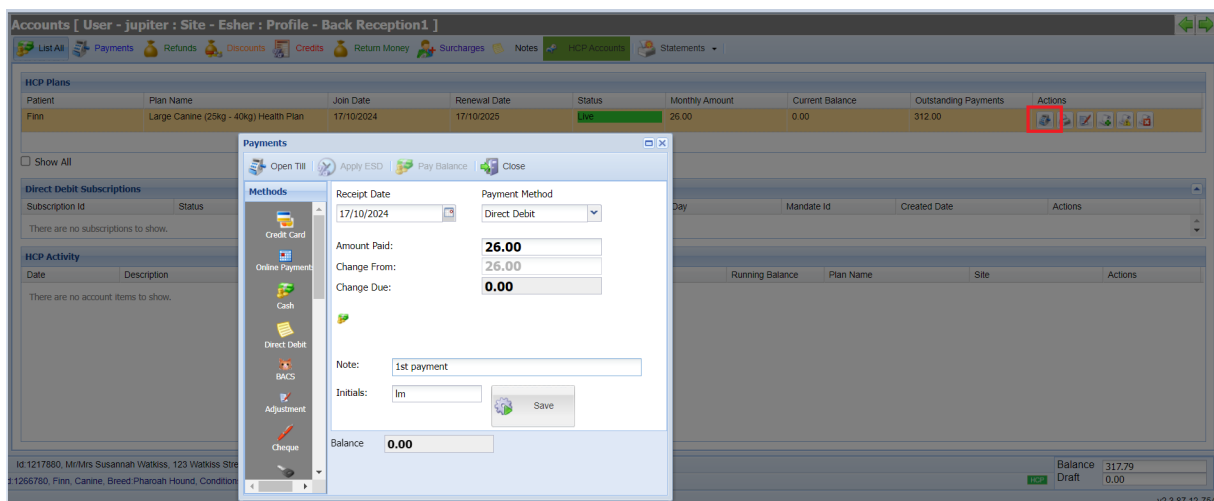
3. The “Join HCP” window will display all available plans for the selected patient.

The screenshot shows the 'Join Health Care Plan' window. At the top, there are fields for 'Patient: Finn', 'Description: Large Canine (25kg - 40kg) He', 'Cost: 312.00', a 'Join' button (highlighted with a red rectangle), and 'Join Date: 17/10/2024'. Below these fields is a table titled 'Plans' with the following data:

Plan ID	Description	Sales Start Date	Sales End Date	Monthly Cost	Cost
58	Large Canine (25kg - 40kg) Health Plan	14/01/2020	01/04/2027	26.00	312.00
143	Large Dog Plan '24	10/07/2024	01/07/2027	30.00	360.00
141	Medium Dog Plan (10k>25kg)	21/05/2024	21/05/2025	20.00	240.00
60	Small Canine (< 10kg) Health Plan	14/01/2020	14/01/2027	12.00	144.00
146	Small Dog Plan.	10/10/2024	10/10/2025	20.00	240.00
59	XL Canine (40kg - 65kg) Health Plan	14/01/2020	01/05/2027	23.00	276.00
57	XXL Canine (40kg) Health Plan	14/01/2020	24/02/2050	28.00	336.00

**Note: Remember if you've assigned a species when creating your plan, you will only see plans available for the species of the patient you are joining.**

4. Select the required plan and click the “Join” button.
5. You will be navigated to the HCP Accounts screen to take the initial HCP payment.



## Taking the Initial Payment

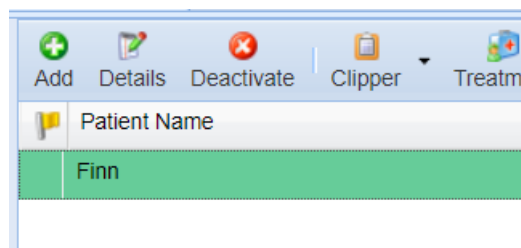
1. Once you have joined a plan and are in the HCP Accounts screen you will be presented with the Payments pop up box (this is a [setting](#) which can be disabled if required).

2. Enter payment details and select Save. Payment will show in the HCP Activity screen

HCP Activity										
Date	Description	Qty	Net	Vat	Receipts	Sales	Running Balance	Plan Name	Site	Actions
17/10/2024 16:17	DirectDebit - 1st payment - Initial - DirectDebit	1	0.00	0.00	26.00	0.00	-26.00	Large Canine (25kg - 40kg) Heal...	Esher	

## Identifying an HCP Patient

An HCP patient default colour will display in highlighted green on the Reception patient grid.



Within Merlin you can have different colours for HCPs, to enable this go to Settings>Reception>Enable Plan Colour.

To assign colours to plans, go to Administration>Healthcare, from here select the plan and click on **Edit**.

Health Care Plan [ User - jupiter : Site - Esher : Profile - Back Reception1 ]					
Plans Utilities Reports Direct Debit Import Renewals					
Add Plan Save As New <b>Edit</b> Active Only Delete Plan Health Plans / Sites Esher					
Plans					
Health Plan ID	Description	Sales Start Date	Sales End Date	Monthly Cost	Available For
146	Small Dog Plan.	10/10/2024	10/10/2025	20.00	Active
143	Large Dog Plan '24	10/07/2024	01/07/2027	30.00	Active
141	Medium Dog Plan (10k>25kg)	21/05/2024	21/05/2025	20.00	Active

Once in the plan you can add a short code, which will show in the patients summary bar and assign the required colour.

Health Care Plan [ User - jupiter : Site - Esher : Profile - Back Reception1 ]					
Plan Admin					
View Plans					
Plan Details					
Description:	Small Dog Plan.	Short Description:	plan 1	Monthly Cost:	20.00
Plan to Replace:		Plan Colour:		Plan Length (Months)	12
Species:	Canine				240.00
				Start Date:	10/10/2024
				End Date:	10/10/2025
				<input checked="" type="checkbox"/> Active	
Available Treatment Groups					
Annual Booster					
Consult					
Edit Delete					

Once the colour has been set this colour will show in the patient area in Reception.

Add Details Deactivate Clipper Treatment Make Appt Consent Lab Join HCP						
Patient Name	Species	Breed	Gender	DOB	ID	
Jeff	Canine	Boxer	Female	12/04/2019	1267024	
Milo	Canine	Cocker Poodle	Neut Male	30/04/2018	1266946	

Also in the side summary bar will show the short Description and colour.

Last Wormed	13/02/2024
Last Flea	13/02/2024
Insurance	AVIVA
Start	N/A
Number	1794500
HCP Tier	plan 1

Items sold out under the HCP will show with the plan colour.

+	18/10/2024	11:25	Dog vaccination course and Health check	General	1	60.00	T Pointer (TPointer)	Esher			Jupiter	18/10/2024	Vacci...
%	18/10/2024	11:25	Dog vaccination course and Health check (Health Plan Discount)	General	1	-60.00	T Pointer (TPointer)	Esher			Jupiter	18/10/2024	Vacci...

The patient will also be displayed with an HCP icon on the Daylists and Patient Summary bar. This will show as Green.

Id: 1266946, Milo, Canine, Breed Cocker Poodle, Conditions: Allergic to wheat, 6 Years 5 Months 18 Days old, 9.000Kg[20/08/2024], Neut Male, Chip Id: 030000045698, AVIVA												HCP	Draft
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## Dispensing items

1. Add treatment as normal.
2. The system will automatically discount items according to your plan's configuration.
3. HCP discounts will automatically display on your treatment draft screen when dispensing items.

Item Date

☐ MWI Pharmacy
 ☐ Prescription

Description (search using a minimum of 2 characters)

Code

01/07/2024

Draft Items

	Date	Pati...	Description	Clinical...	Qty	Net	V...	T...	
	01/07/2...	Tinker	Hills Feline Id 2k	Ge...	1	14.79	2.96	17.75	Jo
	01/07/2...	Tinker	Hills Feline Id 2k (Health Plan Discount)	Ge...	1	-1.48	-0.30	-1.78	Jo

4. Save your treatment.
5. The items are saved onto Treatment History and are highlighted in the default green unless the 'Enable Plan Colour' is ticked in settings to distinguish them as Health Care Plan Sales.

Date: 01/07/2024								
🚫	01/07/2024	16:36	Diets Hills Feline Id 2k	General	1			
%	01/07/2024	16:36	Hills Feline Id 2k (Health Plan Discount)	General	1			

6. The discount is also shown on the Accounts screen.

Dis	05/09/2024	1015525		05/09/2024 12:10	Claw Clip
✓	05/09/2024	1015525		05/09/2024 12:10	Claw Clip (Health Plan Discount)

## Viewing a Patient's HCP Entitlements

1. Navigate to the **Treatment Screen**
2. Select the **'Health Care Plan' tab**.
3. This screen will show you what the plan consists of, how many items have been used and how many items are available for the patient.

Treatment [User - jupiter : Site - Esher : Profile - Back Reception]

PaymentsReferralPrint HistoryBarcodeClinicalDoc MgmtMake ApptAccountWeightConsentView PACSRefreshPatient LabPatient Details

HistoryPre-InvoiceAdd TreatmentPrescriptionsSaved EstimatesDocumentsPatientsClient NotesArchiveHealth Care Plan

Current Balance: £0.00Discount gained on Core plan items: £0.00Discount gained on additional items sold via plan: £1.78

Cat Health Plan

Description	Discount Percentage	Start Period	End Period	Number Available	Used
Flea	100	0	0	12	0
Wormer	100	0	0	2	0
Vaccination	100	0	0	1	0
Diets	10	0	0	998	1