

Treatment Groups

24/07/2025 1:44 pm BST

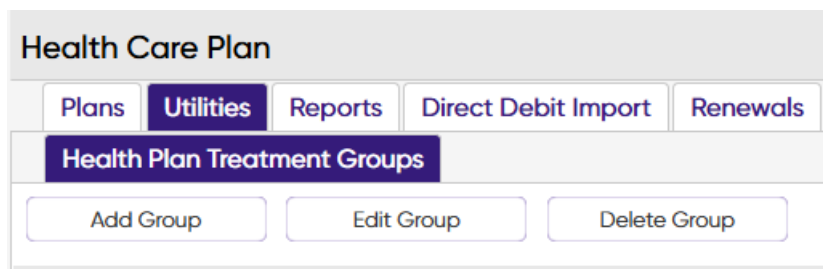
Summary

The first step of setting up your Health Care Plans is to configure your Treatment Groups. Treatment groups handle the discounting of dispensed items for HCP Patients.

Details

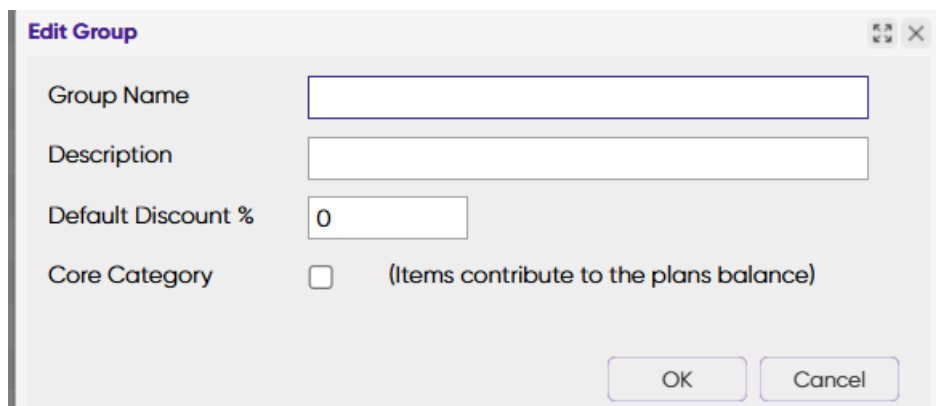
Adding Health Plan Treatment Groups

1. Navigate to the HCP Treatment Groups screen (Administration > Health Care > Utilities). Your Health Plan Treatment Groups will be shown here.
2. To add a new group, select 'Add Group'



The screenshot shows the 'Health Care Plan' interface. At the top, there's a header 'Health Care Plan'. Below it, a navigation bar contains tabs: 'Plans', 'Utilities' (which is highlighted), 'Reports', 'Direct Debit Import', and 'Renewals'. Under the 'Utilities' tab, there's a sub-section titled 'Health Plan Treatment Groups'. Below this sub-section, there are three buttons: 'Add Group', 'Edit Group', and 'Delete Group'.

3. The following screen will show, prompting you for the following information:



The screenshot shows a dialog box titled 'Edit Group'. It has four input fields: 'Group Name' (a text box), 'Description' (a text box), 'Default Discount %' (a text box with '0' entered), and 'Core Category' (a checkbox). To the right of the checkbox is the text '(Items contribute to the plans balance)'. At the bottom right of the dialog box are two buttons: 'OK' and 'Cancel'.

1. Group Name = Name of the Treatment Group
2. Description = Description of the Treatment Group (Often a repeat of the group name)

Default Discount = Default discount percentage amount. This can be manually over written when creating plan contents.

Core Category = Tick to set this treatment group as a Core Category. This means they will contribute to any HCP debt should a client end their plan part way through.

3. Select 'OK' to add the group.

For example, in the screenshots below, we have created two Treatment Groups. One for Vaccinations with a default discount of 100% and a Treatment Group for Consultations with a 50% default discount. These Treatment Groups are marked as 'core categories'.

The 'Edit Group' dialog box shows the following fields:

- Group Name: Annual Vaccination
- Description: Annual Vaccination
- Default Discount %: 100
- Core Category: ☒ (Items contribute to the plans balance)

Buttons: OK, Cancel

The 'Edit Group' dialog box shows the following fields:

- Group Name: Consultations
- Description: Consultations
- Default Discount %: 50
- Core Category: ☒ (Items contribute to the plans balance)

Buttons: OK, Cancel

Once you click 'OK' the treatment groups will be added to the Treatment Group Grid (as shown below).

Health Plan Treatment Groups			
<div>Add Group Edit Group Delete Group</div>			
Name	Default Discount Percentage	Core Category	
Anal Glands	10		<input type="checkbox"/>
Dental	10		<input checked="" type="checkbox"/>
Diet	10		<input checked="" type="checkbox"/>
Flea	100		<input checked="" type="checkbox"/>
Kennel Cough	50		<input checked="" type="checkbox"/>
Microchip	33.33		<input checked="" type="checkbox"/>
Nail Clip	100		<input type="checkbox"/>

Editing Treatment Groups

If you would like to edit a Treatment group:

1. Select the the group you would like to edit and select 'Edit Group'.
2. The 'Edit Group' window will display allowing you to change the Group Name, Description, Default Discount % or Core Category previously entered.
3. Make your changes and select 'OK' to save the changes.

Deleting Treatment Groups

To delete a Treatment Group:

1. Select the group from the Treatment Group Grid.
2. Select the 'Delete Group' button.

NB It will not be possible to delete a group if it has assigned treatments in code entry.

Assigning Treatment Groups to Codes

Once your Treatment Groups have been set up you need to select which Codes are allocated to each Treatment group.

For more information, see: [HCP Code Maintenance](#)
