

Creating Plans

24/07/2025 1:48 pm BST

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

Health Care Plan

Plan Admin

View Plans

Plan Details

Description: Short Description: Monthly Cost: Start Date:

Plan to Replace: Plan Colour: Plan Length (Months) End Date:

Species: Total Cost: ☒ Active

Available Treatment Groups << Plan Contents

- Anal Glands
Default Discount Percentage: 10%
- Dental
Default Discount Percentage: 10%
- Diet
Default Discount Percentage: 10%
- Flea
Default Discount Percentage: 100%
- Kennel Cough
Default Discount Percentage: 50%
- Microchip
Default Discount Percentage: 33.33%
- Nail Clip
Default Discount Percentage: 100%
- Neutering
Default Discount Percentage: 10%

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: (Raise a ticket with support for this)

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.

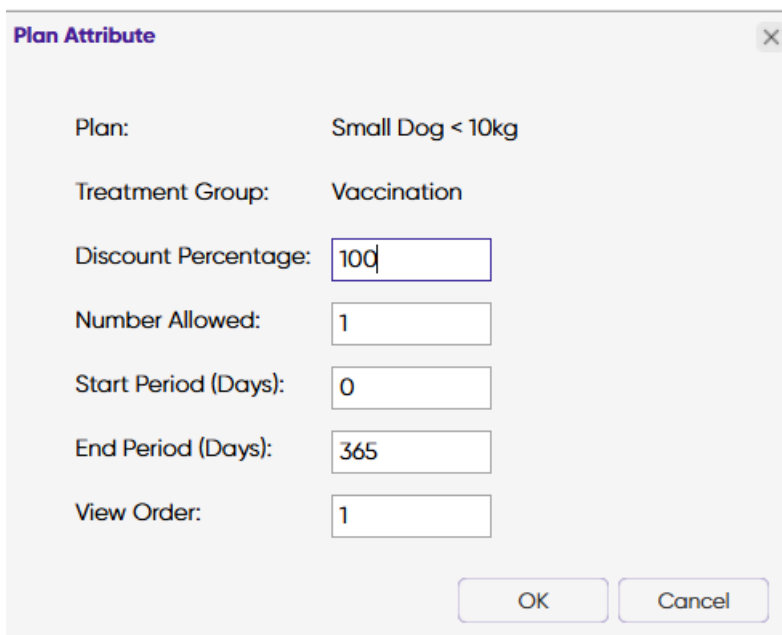
The screenshot displays the Plan Admin interface. On the left, under 'Available Treatment Groups', there is a list of treatment groups with their default discount percentages:

- Anal Glands**: Default Discount Percentage: 10%
- Dental**: Default Discount Percentage: 10%
- Diet**: Default Discount Percentage: 10%
- Flea**: Default Discount Percentage: 100%
- Kennel Cough**: Default Discount Percentage: 50%
- Microchip**: Default Discount Percentage: 33.33%
- Nail Clip**: Default Discount Percentage: 100%

On the right, under 'Plan Contents', there is a list of assigned treatment groups with their respective discount percentages, number of allowed instances, and start/end periods:

- Vaccination**: Discount Percentage: **100%** Number Allowed: **1**
Start Period (Days): **0** End Period (Days): **365**
- Kennel Cough**: Discount Percentage: **50%** Number Allowed: **1**
Start Period (Days): **0** End Period (Days): **365**
- Six Month Health Check**: Discount Percentage: **100%** Number Allowed: **1**
Start Period (Days): **0** End Period (Days): **365**
- Vet Consultation**: Discount Percentage: **10%** Number Allowed: **8**
Start Period (Days): **0** End Period (Days): **365**

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

A screenshot of a 'Plan Attribute' dialog box. It has a title bar with 'Plan Attribute' and a close button. The dialog contains several fields: 'Plan:' with the value 'Small Dog < 10kg', 'Treatment Group:' with the value 'Vaccination', 'Discount Percentage:' with a text box containing '100', 'Number Allowed:' with a text box containing '1', 'Start Period (Days):' with a text box containing '0', 'End Period (Days):' with a text box containing '365', and 'View Order:' with a text box containing '1'. At the bottom right are 'OK' and 'Cancel' buttons.

Plan:	Small Dog < 10kg
Treatment Group:	Vaccination
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'.

View the [Guidance for HCPs](#) page for tips on staggering allowances and variable discounting.
