HCP Accounts

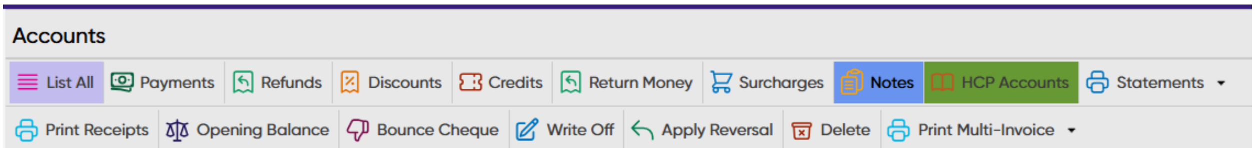
24/07/2025 3:14 pm BST

Summary

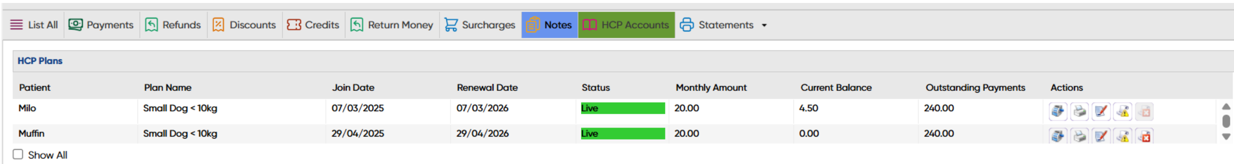
Health Care Plan Account transactions are separated from day-to-day Account transactions.

Details

A Client's HCP Account can be accessed through the Accounts screen. If the Client has any pets joined to an HCP, the 'HCP Accounts' button will display in green. Select this button to view a Client's HCP Account.



The HCP Accounts Screen displays a list of Patients that have an HCP Account. To show any inactivate (ended or expired) plans, tick the 'Show All' checkbox.



Viewing a Patient's HCP Account

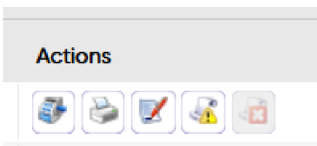
1. From the Clients HCP Accounts select a listed HCP plan.
2. Once selected, the Patients HCP account will load.

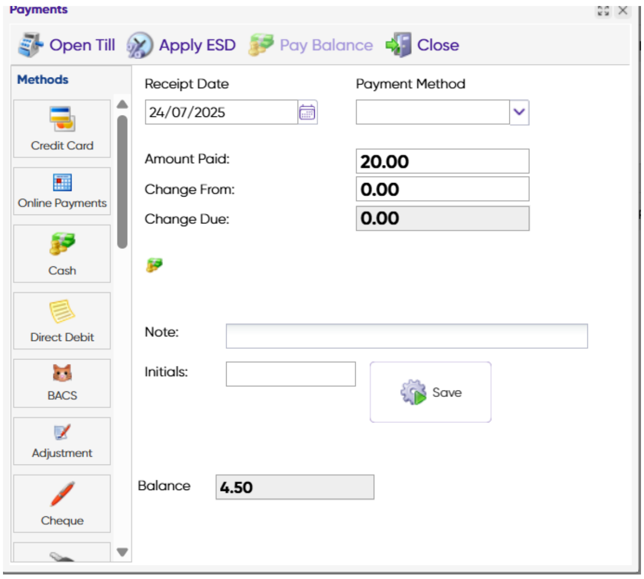
The HCP Accounts screen is split into 2 sections: HCP Plans and HCP Activity.

HCP Account Actions

Making an HCP Payment

Selecting the 'Make the HCP Payment' button will display a payment window.





1. Specify the Payment Date, Payment Method and Amount Paid.
2. If the Payment Method selected is 'Cash' see steps 3 and 4, if not see step 5.
3. Specify the 'Change From' (amount tendered).
4. The Change Due is displayed.
5. Enter a note (if required).
6. Enter your Initials
7. Select 'Save'. The Payment will be added to the Clients HCP account.

Deleting an HCP Payment

1. Locate and select the payment in the HCP Accounts screen you wish to delete.
2. Select the Delete HCP Payment button.

Printing an HCP Statement

1. Select the 'Print Statement' button
2. A PDF statement is generated for all HCP transactions for the selected Patient/Plan.

Writing off an HCP Balance

1. Select the 'Write Off' button
2. The balance will be written off (set to £0.00) and a transaction will appear on the HCP Account.

Suspending a Plan

This functionality can be used in the event of a payment failure.

Note: This is a Merlin only functionality and isn't utilised by third party direct debit integrations.

1. Select the 'Suspend' button
2. The patient will no longer receive HCP discounts on dispensed items.

Un-suspending a Plan

To reverse the suspension of a plan:

1. Select the 'Un-suspend' button
2. The patient will return to active and receive HCP discounts on dispensed items.
3. The payments window ill open so that the Client can make any required payments.

Ending a Plan

To end a Health Care Plan, the Plan's balance has to be zero (£0.00). This can be achieved by performing an HCP Payment or a Write off to eliminate the remaining balance.

Once the balance is zero:

1. Select the 'End Plan' button.
2. The plan will be ended and the patient will no longer receive HCP discounts.

Note: If you are using a direct debit collection company, you need to manually notify your provider so they can stop taking payments.