

# Renewals

24/07/2025 3:23 pm BST

## Summary

Health Plan Renewals is an Admin tool for Health Plans 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

Health Care Plan

Plans

Utilities

Reports

Direct Debit Import

Renewals

Show renewals due in the next  Months ☐ Include Overdue Plans

Status

Client Site

Plan

Export to CSV

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 status "Not Auto", recommended. Now select the "Select All" button which puts a tick in all plans within the "selected plan). Select "Assign Action".
2. The Auto Action window will display

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[Export to CSV](#)

Clear Filters

Select All

Assign Action

Client	Animal	Plan	Animal Weight	Renewal Date	Current Balance	Plan Cost	Outstanding Payments	Auto Action	Action Type	Write Off Debt	Renewal Plan	Action Status
<input type="checkbox"/> Bill Clegg	Milo	Small Dog < 10kg	7.400000000		240.00							
<input type="checkbox"/> Ellie Lightowler	Milo	Small Dog < 10kg	10.000000000	Auto Action	240.00			<input checked="" type="checkbox"/>	Renew Plan	<input checked="" type="checkbox"/>	Extra Large Dog...	Pending
<input type="checkbox"/> Julie Wood	Max	Small Dog < 10kg	8.000000000	<input checked="" type="checkbox"/> Auto Action this plan	240.00			<input checked="" type="checkbox"/>	Renew Plan	<input checked="" type="checkbox"/>	Extra Large Dog...	Pending
<input type="checkbox"/> H Dowell	Norma	Small Dog < 10kg			240.00			<input checked="" type="checkbox"/>	Renew Plan	<input checked="" type="checkbox"/>	Extra Large Dog...	Pending
<input checked="" type="checkbox"/> Ellie Lightowler	Muffin	Small Dog < 10kg	10.000000000		240.00							
<input checked="" type="checkbox"/> T. Jupiter	Charlie	Small Dog < 10kg	7.600000000		220.00							

Action Type

☒ Auto Renew
 

Renew to this plan

Small Dog < 10kg

☐ End Plan

☒ Write Off Debt Balance

OK

Cancel

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'. This will re-start the HCP balance on the account back at zero.
6. Select 'OK' to save. The plans will renew to the specified plan once the renewal date is met. The status will remain as pending until that date.

Note: Always remember to periodically tick the “Include Overdue Plans” box just in case there have been any that have been missed.

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

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