# Renewals

24/07/2025 3:23 pm BST

### **Summary**

Health Plan Renewals is an Admin tool for Health Pans 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



2. Use the filters options to generate a list of clients. The available filters are:

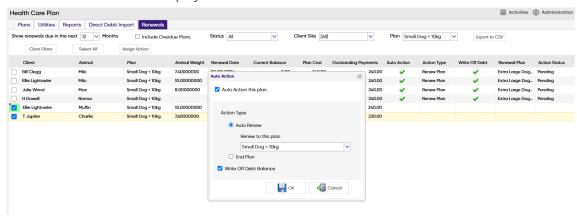
Show renewals due in the next 'X' Months = Select which plans expire in the next 'X' months.

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



- 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.