Using HCPs

24/07/2025 3:37 pm BST

Summary

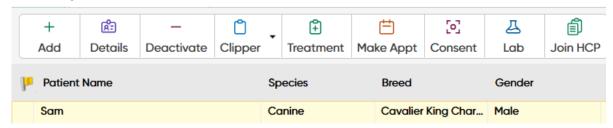
The <u>HCP</u> module is integrated into the main treatment screen, automatically discounting and dispensing items from the plan.

This page documents the following day-to-day processes:

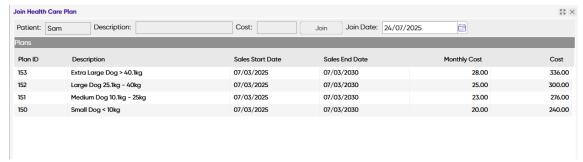
- Joining a Health Care Plan
- Taking the initial payment
- Identifying a HCP Patient
- Dispensing Items
- Viewing a Patient's HCP Entitlements

Joining a Health Care Plan

- 1. Search and Select a Patient from Reception
- 2. Select the "Join HCP" button



3. The "Join HCP" window will display all available plans for the selected patient.



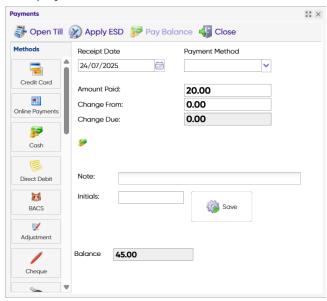
Note: Remember if you've assigned a species when creating your plan, you will only see plans available for the species of the patient you are joining.

- 4. Select the required plan and click the "Join" button.
- 5. You will be navigated to the HCP Accounts screen where you can take the initial payment if required.



Taking the Initial Payment

1. The payments pop up will display.



2. Enter payment details and select Save. Payments will show in the HCP Activity screen



Identifying an HCP Patient

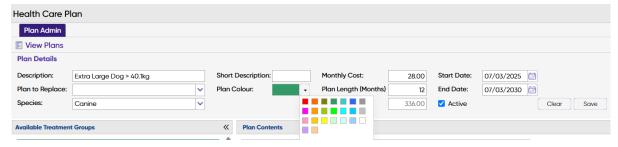
An HCP patient default colour will display in highlighted green on the Reception patient grid as this si the default colour. However plan colours can be assigned during plan creation.



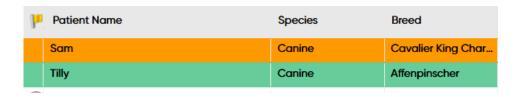
Within Merlin you can have different colours for HCPs, to enable this go to Settings>Reception><u>Enable Plan</u> Colour.

To assign colours to plans, go to Administration>Healthcare, from here select the plan and click onEdit.

Once in the plan you can add a short code, which will show in the patients summary bar and assign the required colour.



Once the colour has been set this colour will show in the patient area in Reception.



Also in the side summary bar will show the short Description and colour.



Items sold out under the HCP will show with the plan colour.



The patient will also be displayed with an HCP icon on the Daylists and Patient Summary bar. This will show as Green.



Dispensing items

- 1. Add treatment as normal.
- 2. The system will automatically discount items according to your plan's configuration.
- 3. HCP discounts will automatically display on your treatment draft screen when dispensing items.



- 4. Save your treatment.
- 5. The items are saved onto Treatment History and are highlighted in the default green unless the

'Enable Plan Colour' is ticked in settings to distinguish them as Health Care Plan Sales.



6.

7. The discount is also shown on the Accounts screen.

24/07/2025 15:35	Consultation First	Andrew	0.00	1.00	37.50	7.50	45.00
24/07/2025 15:35	Consultation First (Health Plan Discount)	Andrew	0.00	1.00	-3.75	-0.75	-4.50

Viewing a Patient's HCP Entitlements

- 1. Navigate to the Treatment Screen
- 2. Select the 'Health Care Plan' tab.
- 3. This screen will show you what the plan consists of, how many items have been used and how many items are available for the patient.

