

Using HCPs

24/07/2025 3:37 pm BST

Summary











The HCP 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

 Add	 Details	 Deactivate	 Clipper	 Treatment	 Make Appt	 Consent	 Lab	 Join HCP
 Patient Name		Species		Breed		Gender		
Sam		Canine		Cavalier King Char...		Male		

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

Join Health Care Plan

Patient:

Sam


Description:

Cost:

Join

Join Date:

24/07/2025



Plans

Plan ID	Description	Sales Start Date	Sales End Date	Monthly Cost	Cost
153	Extra Large Dog > 40.1kg	07/03/2025	07/03/2030	28.00	336.00
152	Large Dog 25.1kg - 40kg	07/03/2025	07/03/2030	25.00	300.00
151	Medium Dog 10.1kg - 25kg	07/03/2025	07/03/2030	23.00	276.00
150	Small Dog < 10kg	07/03/2025	07/03/2030	20.00	240.00

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.

Accounts								Activities	Administration
List All	Payments	Refunds	Discounts	Credits	Return Money	Surcharges	Notes	HCP Accounts	Statements

HCP Plans								
Patient	Plan Name	Join Date	Renewal Date	Status	Monthly Amount	Current Balance	Outstanding Payments	Actions
Maple	Rabbit	07/03/2025	07/03/2026	Live	12.00	0.00	144.00	
Sam	Medium Dog 10.1kg - 25kg	24/07/2025	24/07/2026	Live	23.00	0.00	276.00	
Tilly	Test Plan Dog	02/05/2025	02/05/2026	Live	20.00	45.00	240.00	

Taking the Initial Payment

- The payments pop up will display.

Open Till

Apply ESD

Pay Balance

Close

Methods

Credit Card

Online Payments

Cash

Direct Debit

BACS

Adjustment

Cheque

Receipt Date

24/07/2025

Payment Method

Amount Paid:

20.00

Change From:

0.00

Change Due:

0.00

Note:

Initials:

Save

Balance

45.00

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

HCP Plans								
Patient	Plan Name	Join Date	Renewal Date	Status	Monthly Amount	Current Balance	Outstanding Payments	Actions
Maple	Rabbit	07/03/2025	07/03/2026	Live	12.00	0.00	144.00	
Sam	Medium Dog 10.1kg - 25kg	24/07/2025	24/07/2026	Live	23.00	-23.00	253.00	
Tilly	Test Plan Dog	02/05/2025	02/05/2026	Live	20.00	45.00	240.00	

Show All

HCP Activity										
Date	Description	Qty	Net	Vat	Receipts	Sales	Running Balance	Plan Name	Site	Actions
24/07/2025 15:29	CreditCard - First payment - Initial - CreditCard	1	0.00	0.00	23.00	0.00	-23.00	Medium Dog 10.1kg - 25kg	Esher	

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.

Patient Name	Species
Sam	Canine

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

Health Care Plan

Plan Admin

View Plans

Plan Details

Description: Extra Large Dog > 40.1kg Short Description: Monthly Cost: 28.00 Start Date: 07/03/2025
 Plan to Replace: Plan Colour: Plan Length (Months): 12 End Date: 07/03/2030
 Species: Canine 336.00 ☒ Active Clear Save

Available Treatment Groups Plan Contents

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

Patient Name	Species	Breed
Sam	Canine	Cavalier King Char...
Tilly	Canine	Affenpinscher

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

Last Wormed	N/A
Last Flea	N/A
Insurance	Admiral
Start	N/A
Number	45206356
HCP Tier	MedDog

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

02/05/2025	13:37	Consultation 1
02/05/2025	13:37	Consultation 1 (Health Plan Discount)

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

Id:15222, Mr A Smith, 23 Shortlands, Portland, DT5 2LG, Small Animal
Id: 1266581, Tilly, Canine, Breed: Affenpinscher, Conditions: No Allergies, 7 Years 4 Months 13 Days old, 0Kg, null, No Chip Id, Uninsured

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.

Item Date

24/07/2025

15:36

MWI Pharmacy

Prescription

Dispense from

Esher

Description (search using a minimum of 2 characters)

Code

Clinical Code

General

Patient

Tilly

Surgeon

Andrew Black (AB)





Add

Draft Items

<div><div></div><div>Date</div></div>	Patient	Description	<div><div></div><div>Clinical Code</div></div>	Qty	Net	VAT	Total	<div><div></div><div>Surgeon</div></div>	Site	Grp	Computer	Modified	Modified By	HCP
<div><div></div><div>24/07/2025</div></div>	Tilly	Consultation First	<div><div></div><div>General</div></div>	1	37.50	7.50	45.00	Andrew Black (A...	Esher		Consul...	24/07/2025	Jupiter	Vet Co...
<div><div></div><div>24/07/2025</div></div>	Tilly	Consultation First (Health Plan Discount)	<div><div></div><div>General</div></div>	1	-3.75	-0.75	-4.50	Andrew Black (A...	Esher		Consul...	24/07/2025	Jupiter	Vet Co...

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.

Date: 01/07/2024						
		01/07/2024	16:36	Diets Hills Feline Id 2k	 General	1
		01/07/2024	16:36	Hills Feline Id 2k (Health Plan Discount)	 General	1

- 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.

Treatment

ActivitiesAdministrati

PaymentsReferralPrint HistoryBarcodeClinicalDoc MgmtMake ApptAccountWeightConsentView PACSRefreshPatient Lab

HistoryPre-InvoiceAdd TreatmentPrescriptionsSaved EstimatesDocumentsPatientsClient NotesArchiveHealth Care Plan

Current Balance: £4950

Discount gained on Core plan items: £4950

Discount gained on additional items sold via plan: £0.00

Test Plan Dog

Description	Discount Percentage	Start Period	End Period	Number Available	Used
Nail Clip	50	0	0	999	0
Vet Consultation	100	0	0	0	1
Flea	100	0	90	3	0
Vet Consultation	10	0	0	998	1
Flea	100	85	180	3	0