

Reports for HCP

21/05/2025 1:30 pm BST

Summary

This page documents reports accessed from the Health Care Plan report category within [Standard Reports](#).

Details

Health Care Plan

Report	Description / Function
Health Care Plans - Added Direct Debits	Displays all direct debit subscriptions created within the dates specified. Note: Work Site filter does not affect this report.
Health Care Plans - Cancelled Direct Debits	Displays all direct debit subscriptions cancelled within the dates specified. Note: Work Site filter does not affect this report.
Health Care Plans - Joined by date	List all joined plans in chronological order of joined date. Date Criteria: HCP Joined date.
Health Care Plans - Joined by plan	List all joined plans in chronological order of joined date grouped by Plan Name.
Health Care Plans - Joined by plan (Paid Up front)	List all joined plans in chronological order of joined date grouped by Plan Name where the client paid the full plan value in a single payment.

Payments not received - By Join Date	Shows all plans where a payment has not been received within a calendar month by HCP join date specified. This report is ordered by Month Name, then by Client within the month .
Payments not received - By Payment Date	Shows all plans where a payment has not been received within a calendar month by Payment date specified. This report is ordered by Month Name, then by Client within the month .
Yearly spread	This report shows yearly payments for each new plan joined for each plan. This Report shows the following data: Client Name and ID, Patient Name and ID, Plan Name and ID, Plan Joined and Ended Date, Payment amounts across calendar month for the last 12 months, Totals for the last 12 months and the total payments taken for the plan and the number of Months on the current plan.