Healthcare

21/05/2025 1:06 pm BST

Summary

This page documents healthcare related reports from the Healthcare category in relation to Merlin's in-built Health Care Plan module.

Details

Within the Standard report tab, you will find the following Healthcare reports as shown below:

Health Care

Report	Description / Function
HCP - Sales by Client	Lists all Health Care Plan Invoices by Client between the dates specified. Date: Treatment Date
HCP - Sales by Surgeon & Treatment Type	Lists all Health Care Plan Items by Treatment Type for each Surgeon between the dates specified. Date: Treatment Date
HCP Sales by Client - Detailed	Detailed list of all Health Care Plan Items by Client between the dates specified. Date: Treatment Date
HCP - Write-offs	Lists all Health Care Plan Write Offs between the dates specified. Date: Transaction Date
Health Care Plans - Joined by Date	Lists all Health Care Plan Write Offs between the dates specified. Date: Transaction Date.
Health Care Plans - Joined by Plan	Lists Patients who have joined a Health Care Plan, grouped by site. Date: Join Date.
Health Care Plans - Joined by Plan (paid full upfront)	Lists Patients who have joined a Health Care Plan and had their Health Care Plan balance paid upfront (in full). Date: Join Date.
Health Care Plans - Payments not received	List of Patients with missing Health Care Plan payments by Month. Date: HCP Joined Date.

| Health Care Plans - Yearly Spread | Shows Payments Received in the last 12 months for each Health Care Plan.
 Date: Not applicable, shows last 12 months from today's date. |