

WELLNESS PLANS

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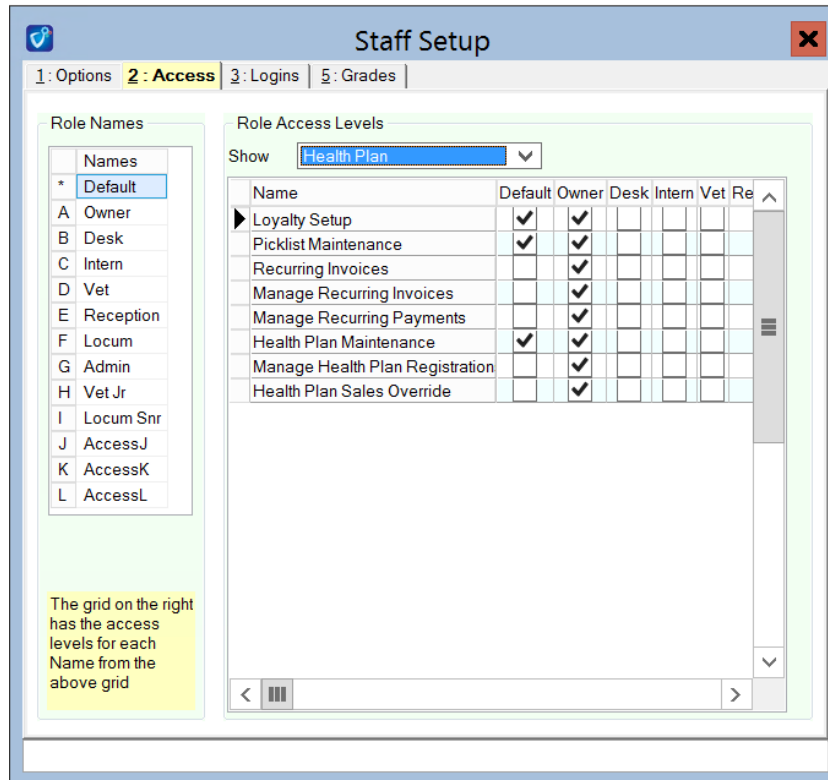
OVERVIEW

Pet plans are preventive healthcare plans for pets which will allow a client an easy and affordable way of managing their pet's health. Health plans are designed to cover most of the pet's healthcare across a period of one year. Health plans cover a pet's regular vaccinations, tests, free visits and offer discounts on selected products and services. Clients have the option to pay upfront as a lump sum or in more affordable monthly instalments.

WELLNESS PLAN SETUP

Security Levels

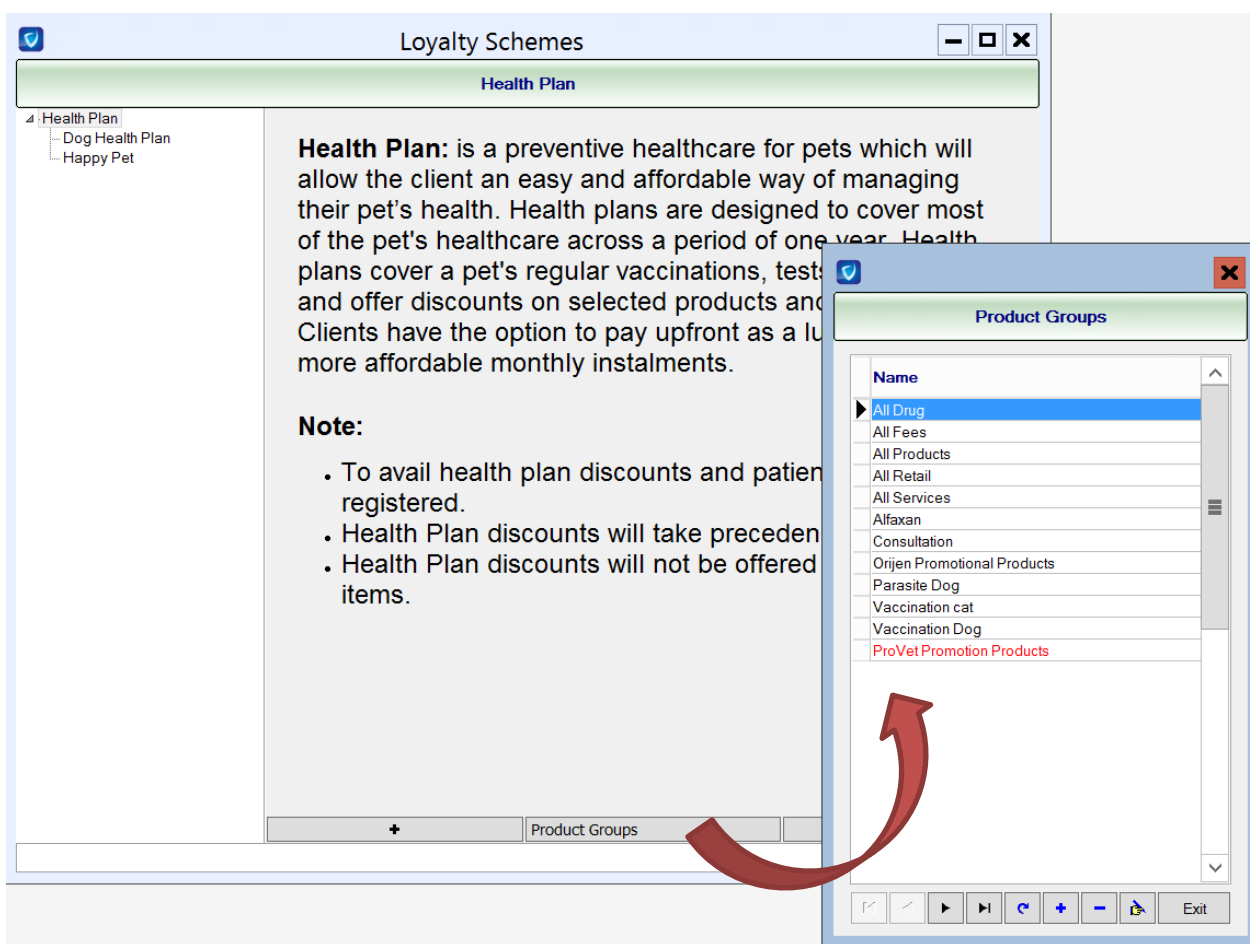
1. **Loyalty Setup:** User access control required for creating/altering any of the loyalty programs in [Options](#) | [Picklists](#) | [Loyalty](#) such as Bonus Points, Purchase Rewards, Client and Patient Discount Scheme and Health Plans
2. **Picklist Maintenance:** User access control required for altering any of the functionality under Picklist Setup
3. **Recurring Invoices:** This controls the ability to create recurring invoices for things like parasite control.
4. **Manage Recurring Invoices:** Controls the ability to manage the recurring invoices by posting/finalising them when they become due.
5. **Manage Recurring Payments:** Not Implemented
6. **Health Plan Maintenance:** User access control for creating health plan template in [Options](#) | [Picklists](#) | [Loyalty](#) | [Health Plans](#).
7. **Manage Health Plan Registration:** User access control required for registration, creation and termination of Health Plans.
8. **Health Plan Sales Override:** User access required to override the Held status of a plan at billing so client may take advantage of the benefit of a held plan.



Creating a Wellness Plan

To create a new Wellness Plan follow the steps below

1. **Options -> Picklists Setup -> Loyalty -> Health Plan**
2. The first thing that you will need to set up will be the Product Groups. This can be accessed by clicking on the **Product Groups** button on the bottom of the Wellness Plans window.
 - a. There are five Product Groups that are already set up for you. These are; All Drugs, All Fees, All Products, All Retail, and All Services. By default, all products that are in your database will be assigned to these Product Groups based on their class. New products will get automatically added as well.
 - b. To add your own Product Groups, then simply click on the **+** button on the bottom of the Product Groups window. Start by giving the group a Name then click on the **+** button to start adding products for that group. For example, you may give a discount on Flea products in your wellness plan. Therefore, you would create a flea products group and add all your flea products to it. Then on Wellness plan you can add the Flea Products group and apply a 10% discount to it.
 - c. Close the Product Group window when done.
 - d. **Note:** that Product Groups are shared between Purchase Rewards, Client Discount, and Patient Discount.



3. Click the + Button to create new health plan
4. Enter the Wellness Plan Details
 - a. **Plan Name:** e.g., Puppy Wellness Plan
 - b. **Status:** Active
 - c. **Plan Term:** 12 months (this is not configurable)
 - d. **Auto Renew:** Days before the Scheme expiry to renew the plan (setting to 0 days will not renew)
 - e. **Stop Manual Price / Discount Change:** Prices / Discounts cannot be overwritten by staff (this is not configurable)
 - f. **Stop Bonus Point:** Plan items will not accrue bonus points (this is not configurable)
 - g. **Registered With:** Only VetlinkPRO created plans are available.
 - h. **Setup Forms:** You can create the registration forms here that detail plan terms and conditions, and /or benefits of the plan.
 - i. **Grace Period:** If a plan instalment has not been paid, this option sets a limit on how many days past its due date can the client still get the plan benefits.
 - j. **Registration Fee:** One-off initial payment to register for the wellness plan.
 - k. **Term Payment (One-off):** Total payment if client pays for entire plan up front.
 - l. **Monthly Payment:** Monthly fee client required to pay for the plan.
 - m. **Payment Monthly:** Auto-calculated from the monthly payment.
 - n. **Weekly Payment:** Weekly fee client required to pay for the plan.
 - o. **Payment Weekly:** Auto-calculated from the monthly payment.

5. Enter Items available on plan

- a. We recommend putting items into product group. Once a plan has started it cannot be changed. However, you can still add and remove items from product groups.
- b. To add a discount or free items to the wellness plan
 - i. Click the **+Product Group** or **+Product button** -> select the group/product you wish to add and it will be added to the plan.
 - ii. In the Disc column add the discount you want to apply. If you wish to give free items then put a 100% discount.
 - iii. In the Limit field enter the limit the client can purchase, e.g., 2 free consults.
 - iv. In the Per Trn field, you can limit the number of items a client can purchase in 1 visit. E.g., to prevent someone purchasing all their flea products on day 1 and then cancelling or not paying for the rest of the plan.

The screenshot shows the 'Loyalty Schemes' window with a 'Health Plan' tab selected. The plan is named 'Senior Dog Health Plan' and is currently 'Inactive'. The configuration includes a 12-month term, a 30-day grace period, and a registration fee of \$50.00. Payments are set at \$25.00 monthly, \$5.80 weekly, or a one-off \$300.00 term payment. The plan is registered with 'In-House' and has a 'Stop Bonus Point' of 'Yes'. Below the configuration is a table of items added to the plan:

Type	Applied On	Disc	Limit	Per Trn	Cost	Sell	Disc Sell
Group	Parasite Dog	25%	No Limit	No Limit			
Group	Consultation	NO CHARGE	Max 2	No Limit			
Group	Orjen Promotional Products	10%	No Limit	No Limit			

At the bottom of the window, there are navigation buttons: a left arrow, a right arrow, a minus sign, and buttons for '+ Product Group' and '+ Product'.

REGISTERING A PATIENT TO A WELLNESS PLAN

1. Open Patient Record
2. Go to **Actions -> Loyalty -> Health Plans**
3. Click **Register** to open the Health Plan window
4. In Loyalty Scheme drop down menu choose the Wellness Plan the patient is registering for.
5. The Plan details will be loaded.
6. Choose the Instalment period the client wishes to pay by.
7. Click the Tick at the bottom of the window to save the plan.
8. Click the **Print** button to print or email the Registration forms for the client to sign and give back.
9. The plan can be exited at this point while the forms are completed.
10. The plan can be opened again later to complete by going to **patient record -> Actions -> Loyalty -> Health Plans -> Double click Health Plan**.
11. Once forms are signed tick **“Client has accepted terms and conditions of the policy”**. Until the client has accepted the terms and conditions of the plan the instalments will not be created.
12. Click the tick to save the plan.
13. A bill will be created for the registration, select whether the client wants to add the first instalment as well.
14. If the bill for the registration is cancelled so the client can pay later, then plan will not start and the client will not receive benefits of the plan. The registration can be paid at a later date by going to **Patient record -> Actions -> Loyalty -> Health Plans -> Double click health plan -> clicks action and select Make payment**.
15. Once the registration is paid the plan will begin.

The screenshot shows the 'Manage Health Plan' window with the following details:

- Title:** Dog Health Plan registration for Juno
- Loyalty Scheme:** Dog Health Plan
- Status:** Active
- Policy Term:** 12
- Premium:** \$301.60
- Reg Fee:** \$50.00
- Starts On:** 8/09/2021
- Finishes On:** 7/09/2022
- Terminated On:** (empty)
- Instalment Payment:** Every Weekly (selected)
- Pay:** \$5.80
- Total Payable:** \$351.60
- Print** button is visible.
- Client has accepted the terms and conditions of the policy:**
- Plan Payment Summary:**
 - Last Paid On: (empty)
 - Last Amt Paid: \$0.00
 - Total Paid: \$0.00
 - Overdue Amt: \$0.00
 - Balance: \$0.00
- Plan Sales Summary:**
 - Regular Value: (empty)
 - Plan Value: (empty)
 - Total Disc: (empty)
- Plan Benefit:**
 - Total Paid: \$0.00
 - Total Disc: (empty)
 - Total Benefit: \$0.00
- Payment Schedule:**
 - Sales: (empty)
 - Plan Items:**

Applied On	Disc	Limit	Per Trm	Qty Sold	Avg Cost	Avg Sell	Tot Disc
Parasite Dog	25%	No Limit	No Limit	0.000	\$0.00	\$0.00	\$0.00
Consultation	NO CHARGE	Max 2	No Limit	0.000	\$0.00	\$0.00	\$0.00
Orijen Promotional Products	10%	No Limit	No Limit	0.000	\$0.00	\$0.00	\$0.00

REDEEMING BENEFITS AT BILLING

Identifying Patient has Wellness Plan

When a bill is made a wellness icon will appear at the top of the patient details on the bill. This will alert staff the patient is on the wellness plan.

Wellness Plan Free Items and Discounts at billing

Items can be sold as normal. If they are on the plan discounts will triggered automatically. If a discount is available the discount will be added as a new line on the bill. Any free items will be added with a 100% discount

Tax Receipt for Jesse James (# 1/1090)

Jesse James
21 Barrys Point Road
Takapuna
Auckland 0622
EXISTING CLIENT

Juno (# 1/1071), Cat, Angora [??]
** FIRST VISIT **

Date: 8/09/2021
Num: # 1/1892
Referral:
Rqst Staff:

#	Staff	Type	Qty	Name	RRP	Discount	Price	Script Notes
1	DC \			For Juno				
I 2	DC R		1	1>Advantage Dog 0-4kg 4m (1 box)	\$61.43		\$61.43	
3	DC R		0.25	1>Dog Health Plan-Plan Discount	-\$15.36		-\$15.36	

Wellness Plan Transaction Limits

Limit reached for Plan

Where a plan has a limit on purchases during the duration of a plan, once that limit is reached the new item will be added as normal without accruing any benefits.

Limit Reached on Bill

Where a plan has a purchase limit for an item within one bill, a message will popup when the bill is created saying;

“Cannot change item quantity. Health Plan bill limit reached. You can continue to sell the item by adding a new bill line item”

Adding a new line in the bill for the extra item but it will not accrue any benefits.

Wellness Plan Overdue Instalments / Grace Periods

If the wellness plan instalments are overdue and have exceeded the grace period within the plan template, a message will pop up when the bill is created saying;

“Health Plan Payment is overdue. Plan has been suspended, benefits will not apply. Would you like to override and apply benefits for this bill”

If overriding and applying benefits a staff member will need to log in with ID and password and be on an access level that has been given privileges to override the held status.

PAYING PLAN INSTALMENTS

Plans can be paid directly from the Patient record or from the Manage Recurring Payment Form.

Plan Payment from Patient Record

Go to [Patient Record -> Actions -> Loyalty -> Health Plans -> Double-click Health Plan Action -> Make Payment -> Pay invoice as needed.](#)

Plan Payments in Bulk from Recurring Payment Form

The Recurring Payment form for bulk payments is primarily designed for quickly reconciling payments in bulk from a bank statement or list from a payment service. It will list all due/unpaid invoices which you can quickly match a payment against rather than making new bill each time

1. Go to [Bills-> Special Functions -> Recurring Bills -> Manage Recurring Payments](#)
2. Tick the Instalments you want to make payments for
3. Click **F9: Add Payment**, this will add **Direct Credit** as the payment method for all ticked instalments.
4. Change Payment method and payment date on individual instalments where required.
5. Click **F12: Make Payments** to process the payments

Manage Recurring Payments

Date From: 3/10/2022 To: 31/10/2022 Status: Active

Client: Bill Status: *ALL*

Description:

Inv...	Desc	Bill Date	Client	Patient Num	Patient	Bill State	Bill Amount	Due Amt	Repeats	Pmt Method	Pmt Date
<input checked="" type="checkbox"/>	338 Cat Health Plan Installment	5/10/2022	Percy Pointing	1022	Rafiki	Paid	\$13.50	\$0.00	1 Week		
<input checked="" type="checkbox"/>	374 Cat Health Plan Installment	9/10/2022	Percy Pointing	1022	Rafiki	Due	\$13.50	\$13.50	1 Week	D : Direct Credit	12/10/2022
<input checked="" type="checkbox"/>	339 Cat Health Plan Installment	9/10/2022	Lois Lane	1036	Krypton	Due	\$55.00	\$55.00	1 Month	D : Direct Credit	12/10/2022
<input checked="" type="checkbox"/>	340 Cat Health Plan Installment	9/10/2022	Lois Lane	1003	Superman	Due	\$55.00	\$55.00	1 Month	D : Direct Credit	12/10/2022

Buttons: Email Selected, F9: Add Payment, F11: Clear Payments, F12: Make Payments, AF3: Exit

RENEWING PLANS

Automatic Renewing of Plans

Auto renewal takes place automatically prior to expiry if auto renew is ticked in plan definition. The new plan will be created a number of days ahead of the current plan expiring based on the Auto Renew (Days) setting configured in the health plan definition. So if Auto Renew is set to 5 days and the current plan expires on 31 May, then the new plan will be created on 26 May.

You can check which plans will auto renew by;

1. Go to [Utilities -> Manage Health Plans](#).
2. Set [Finishes Between](#) dates.
3. Set [Auto](#) to [Yes](#)
4. If the [Next](#) column is filled in that is a link to the renewed plan that will be created.

Renewing Plans where Auto Renew is NO

If plans are not set to Auto Renew you must renew them manually. You can use the Manage Health Plans screen to help manage the renewals.

1. Go to [Utilities -> Manage Health Plans](#).
2. Set [Finishes Between](#) dates.
3. Set [Auto](#) to [No](#)
4. [Tick](#) plan you wish to renew
5. Click [Update Plan](#) button
6. Click [Renew Selected](#)

Stopping a Plan from Renewing

If a client no longer wishes to continue the plan at the end of the term, then the plan will need to be set to Stop Renewing. To do this.

1. Go to [Utilities -> Manage Health Plans](#).
2. Set [Finishes Between](#) dates.
3. Set [Auto](#) to [yes](#)
4. [Tick](#) plan you wish to stop renewing
5. Click [Update](#) at bottom of screen and then [Stop Renewal](#)

For general communication, please use Reports | Bulk Mailers. Health Plan filters and mail merge fields are available to utilise.

Plan Starts Between 9/12/2019 & 9/12/2019

Client Finishes Between 1/08/2023 & 1/10/2023

Patient Status Auto Yes

Nu...	Name	Client	E-Mail	Patient	Spec...	Breed	Age	Start	Finish	Status	Repea...	Amt	Renew On	Next
3	CatHealth Pla Lois Lane		cf.testacc@gmail.com	Superman	Dog	Aust Silky Terrier		15/08/2022	14/08/2023	Pending	Month	\$55.00	13/08/2023	
4	CatHealth Pla Ashlea Langley			Fish	Cat	Domestic Medium Hair		20/09/2022	19/09/2023	Active	One-off	\$600.00	18/09/2023	
2	CatHealth Pla Lois Lane		cf.testacc@gmail.com	Krvpton	Doq	Aust Silky Terrier		15/08/2022	14/08/2023	Active	Month	\$55.00	13/08/2023	

Recuring Payments

EXPORTING PLANS FOR REPORTING

If you wish to do reporting on plans for things such as (but not limited to), number of active plans, plans expiring or plans created this week, then you can use the export/ spreadsheets function.

Create Export

You will first need to create an export. This part should only need to be done once.

1. Go to [Reports -> Export spreadsheets -> Client](#)
2. Click [Add New](#) and click [Yes](#) for design new report prompt.
3. The standard settings can be entered as below;
 - a. Name
 - b. Category = Client
 - c. Printer = Reports1
 - d. Shared = Yes
 - e. Tablelink = Cln -> Anm -> Plan
 - f. In Use Following tables select: Clients, Client Address, Client Contact, Patients, Plan Registration.
 - g. One Entry Per: Usually None
4. Save the Export and it should now appear under Export/Spreadsheets

Run the Export

1. Go to [Reports -> Export spreadsheets -> Client](#)
2. Double click your Loyalty Plan export.
3. Filters page should open
4. Select the Loyalty Plan filters you wish to export by.
5. Click [Next](#)
6. Tick [FieldNames in File](#), set [Surrounds Fields with](#) to [Double Quote](#), set [Separate Fields with](#) to [Comma](#).
7. Click export
8. Select location where you wish to save.
9. Once export has finished you can open export, delete any columns you don't require and sort on any column you need.

TERMINATING A PLAN

It is up to the clinic to decide the rules and processes for cancelling the plan. Terminating a plan in VetlinkPRO will cancel the plan so no more benefits will be offered for the patient. The health plans screen from the Patient record will show a plan benefit section so you can calculate any penalty invoices or refunds for the client. Penalty invoices or refunds must be entered manually by the clinic.

1. Open the Patient record
2. Go to **Actions -> Loyalty -> Health Plans**
3. Double click health plan
4. Click **Terminate** to cancel the plan.
5. The clinic then decides if any penalty invoices or refund will be billed to the client through the normal bill functions.

GENERAL INFORMATION

- Only one active plan can be assigned per patient.
- Health Plan discounts supersede all other discounts
- On complex product discounts only apply to the master item.

RECURRING INVOICES (PARASITE CONTROL)

As part of the health plan, you may send out things like parasite control to the members. To help manage this you can create recurring invoices. For example, you can create a recurring invoice for parasite control for a client that re-occurs every 3 months. You can then generate a list of parasite control recurring invoices for the month so you can see what orders need to be fulfilled.

For more information on creating recurring invoices please refer to the Recurring Invoices section of the Billing chapter.

PAYMENT FILE IMPORT

Overview

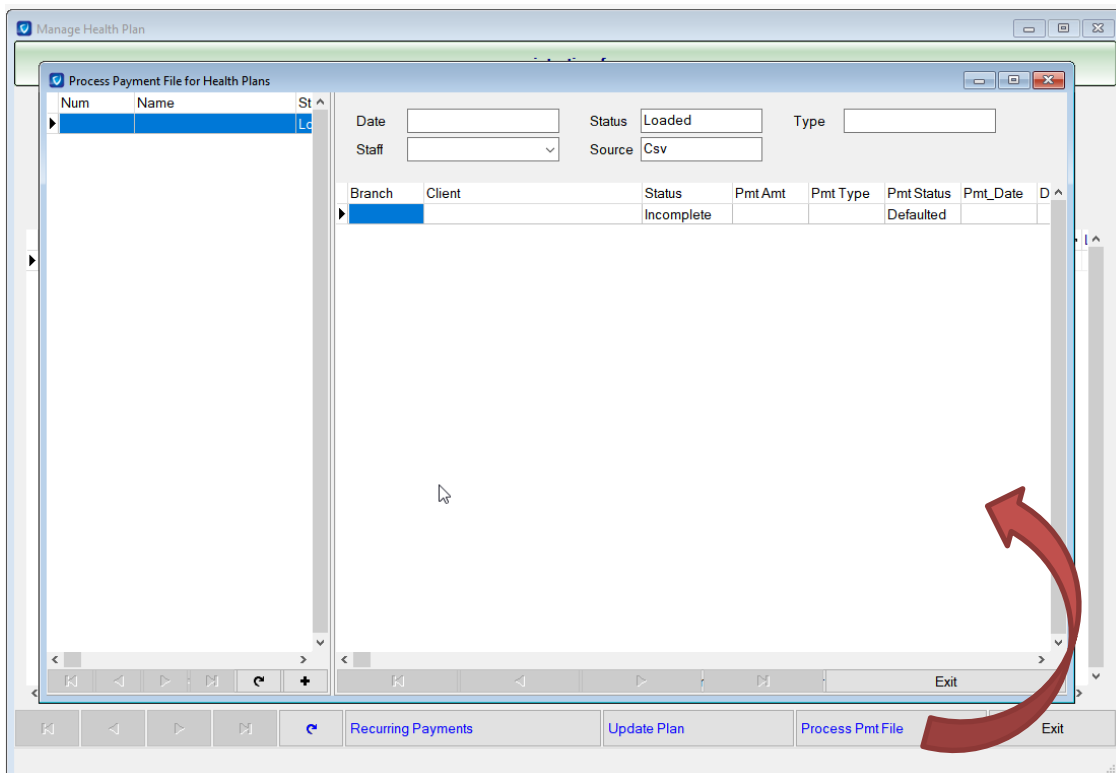
FilePay allow payment files for Health Plans to be uploaded into VetlinkPro and be matched to health plan instalments. (Available from 6.1w and above)

- Only payments with matching health plan instalments reconciled / matched.
- Credits / overpayment not supported
- Refunds not supported.
- Credits, overpayments, refunds and any error must be processed manually.
- The Payments file name must be unique each month to prevent duplicate imports
- A config file must be created by Vetlink Pro Ltd to match your payment file. To create your config file send an example of the payments file you will be using to support@vetlinkpro.com
- The payment format/columns must be the same each month so it matches the config file.
- The payment config file will be configured for monthly or weekly payments.
- Multiple payment configs can be created.

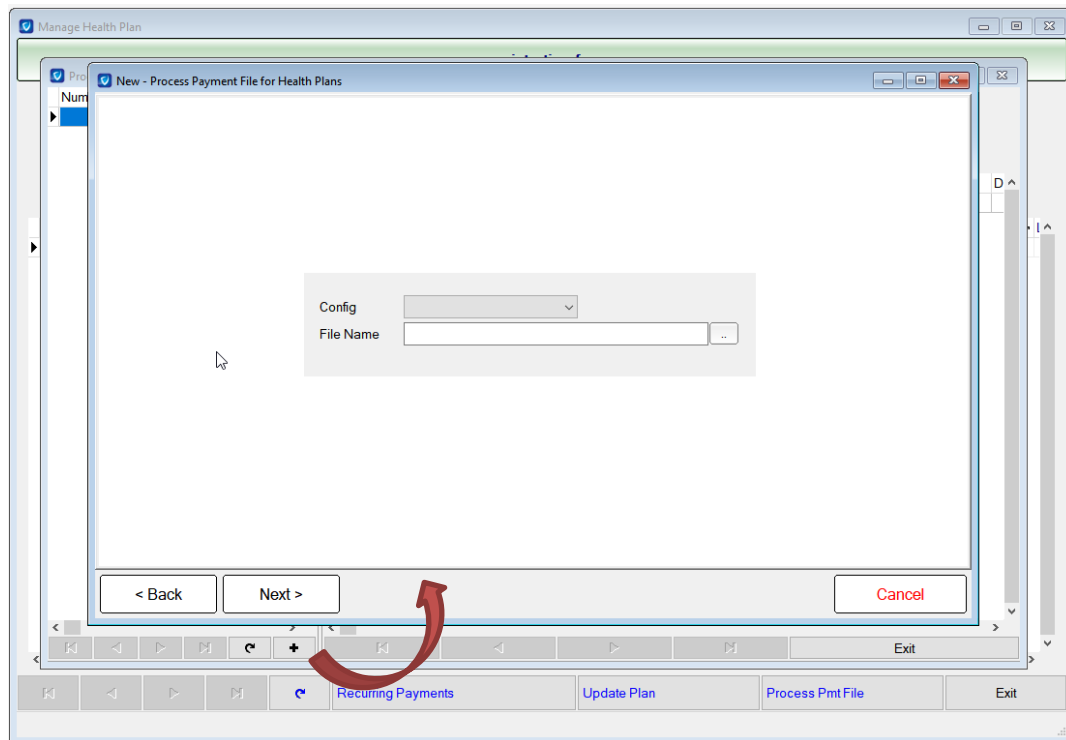
Importing Health Plan Payments

To import health plan payment files

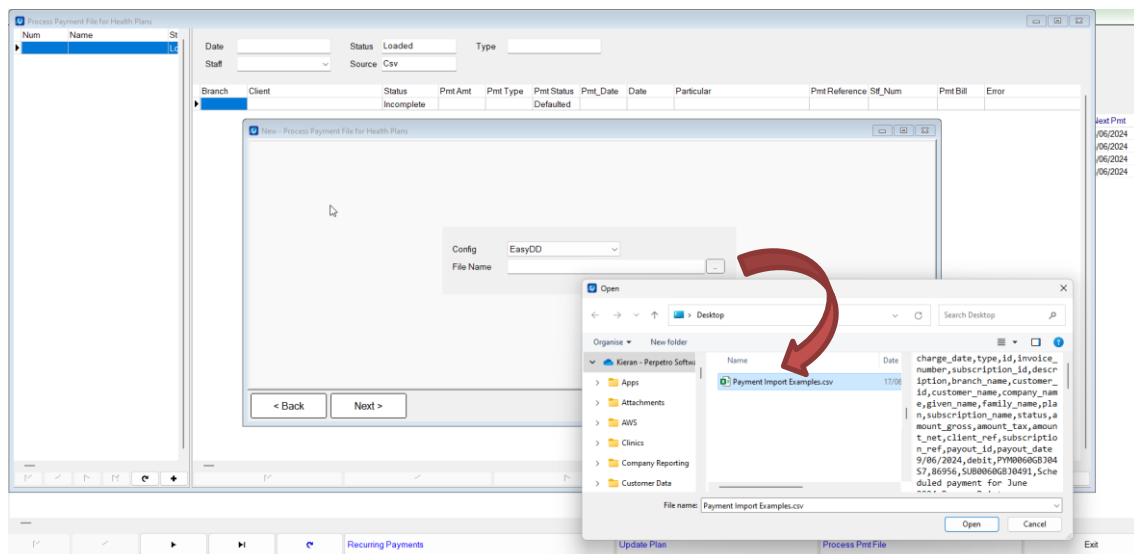
6. Utilities -> Manage Health Plans -> Process Pmt File



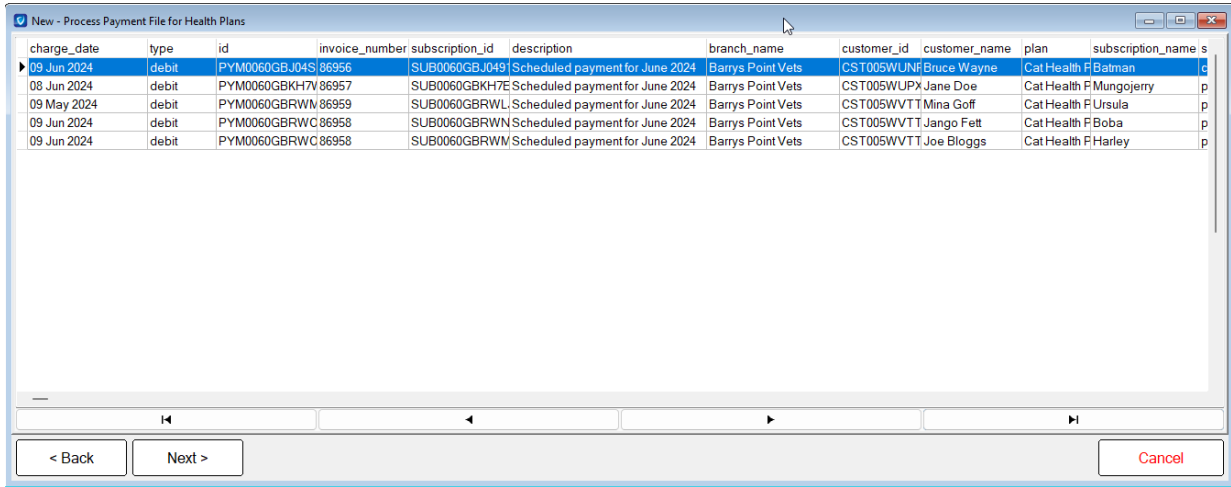
- Click the **+** Button to start a new import.
This will bring up the “New – Process Payment File for Health Plans” screen.



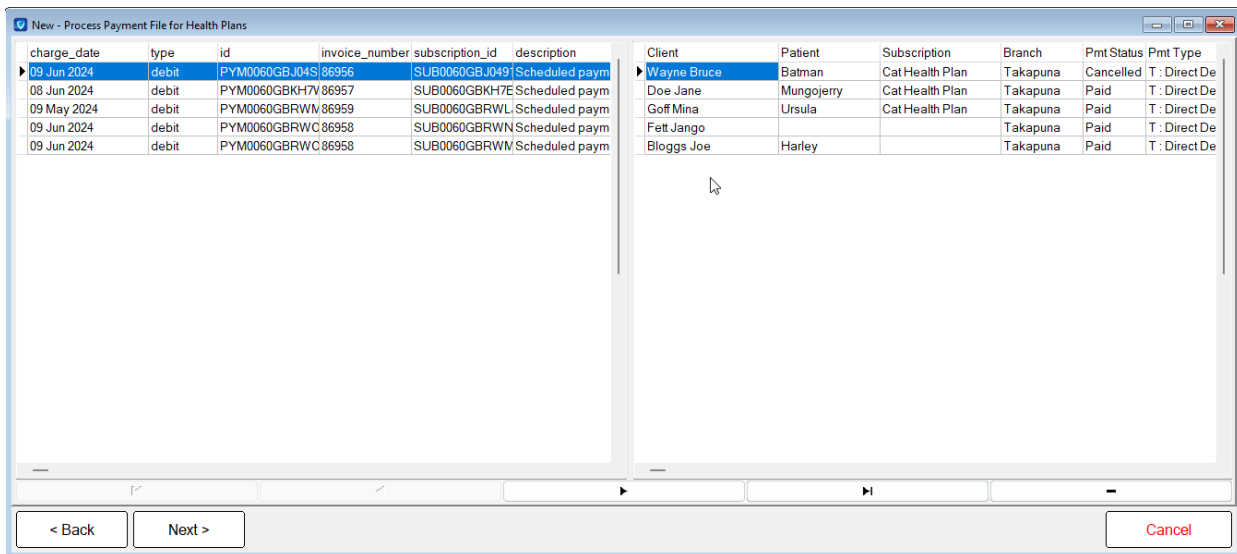
- On the first screen select the File Config from the drop-down list.



9. Choose the payment file by browsing to the correct path.
 - a. File name is unique in the database so once a file is imported it will ne be allowed to be imported again.
10. Click **Next >** button to load the file content.



11. If the file was loaded successfully then the next screen will display the raw content of the file.
12. Once you are happy with this click **Next >** to map the files content with Health plan payments.



13. This screen will show the mapped data on the right side with the proper client, Patient, Plan and payment information.

14. Fix any missing details and validate data.

- a. If a client/patient is not auto loaded double-click on the corresponding row to search for the client/patient.

charge_date	type	id	invoice_number	subscription_id	description	Client	Patient	Subscription	Branch	Pmt Status	Pmt Type
09 Jun 2024	debit	PYM0060GBJ04S	86956	SUB0060GBJ049	Scheduled paym	Wayne Bruce	Batman	Cat Health Plan	Takapuna	Cancelled	T : Direct De
08 Jun 2024	debit	PYM0060GBKH7V	86957	SUB0060GBKH7E	Scheduled paym	Doe Jane	Mungojerry	Cat Health Plan	Takapuna	Paid	T : Direct De
09 May 2024	debit	PYM0060GBRWN	86959	SUB0060GBRWL	Scheduled paym	Goff Mina	Ursula	Cat Health Plan	Takapuna	Paid	T : Direct De
09 Jun 2024	debit	PYM0060GBRWC	86958	SUB0060GBRWN	Scheduled paym	Fett Jango		Cat Health Plan	Takapuna	Paid	T : Direct De
09 Jun 2024	debit	PYM0060GBRWC	86958	SUB0060GBRWN	Scheduled paym	Bloggs Joe	Harley		Takapuna	Paid	T : Direct De

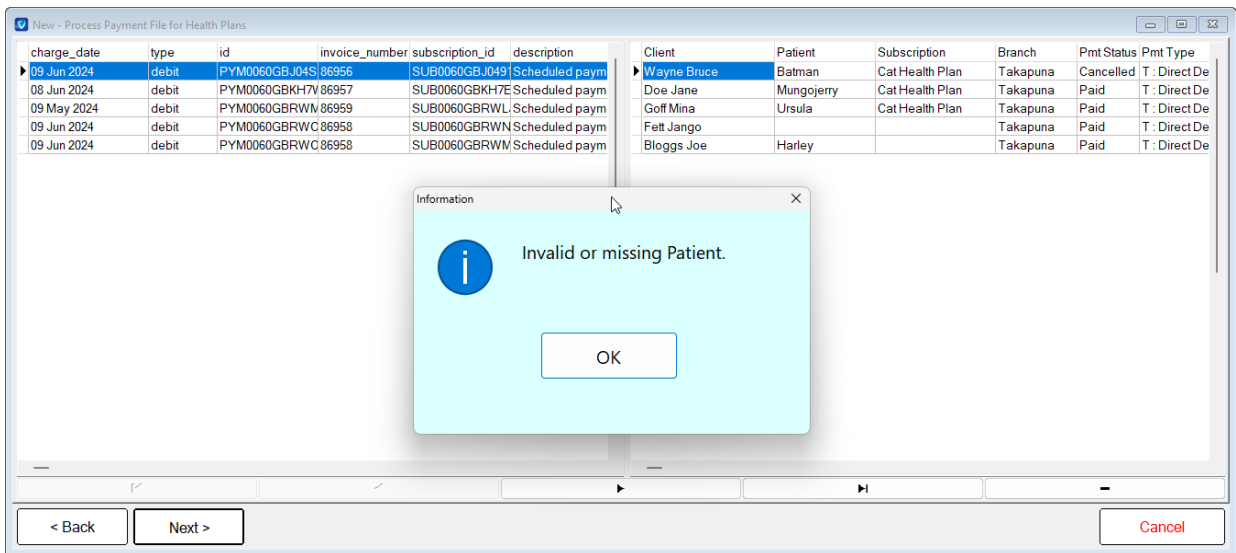
- b. If a valid health plan cannot be found the plan will be blank. You can cancel import and fix plan manually then re-import or you can cancel/ignore that line to continue and fix later.

charge_date	type	id	invoice_number	subscription_id	description	Client	Patient	Subscription	Branch	Pmt Status	Pmt Type
09 Jun 2024	debit	PYM0060GBJ04S	86956	SUB0060GBJ049	Scheduled paym	Wayne Bruce	Batman	Cat Health Plan	Takapuna	Cancelled	T : Direct De
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09 May 2024	debit	PYM0060GBRWN	86959	SUB0060GBRWL	Scheduled paym	Goff Mina	Ursula	Cat Health Plan	Takapuna	Paid	T : Direct De
09 Jun 2024	debit	PYM0060GBRWC	86958	SUB0060GBRWN	Scheduled paym	Fett Jango			Takapuna	Paid	T : Direct De
09 Jun 2024	debit	PYM0060GBRWC	86958	SUB0060GBRWN	Scheduled paym	Bloggs Joe	Harley		Takapuna	Paid	T : Direct De

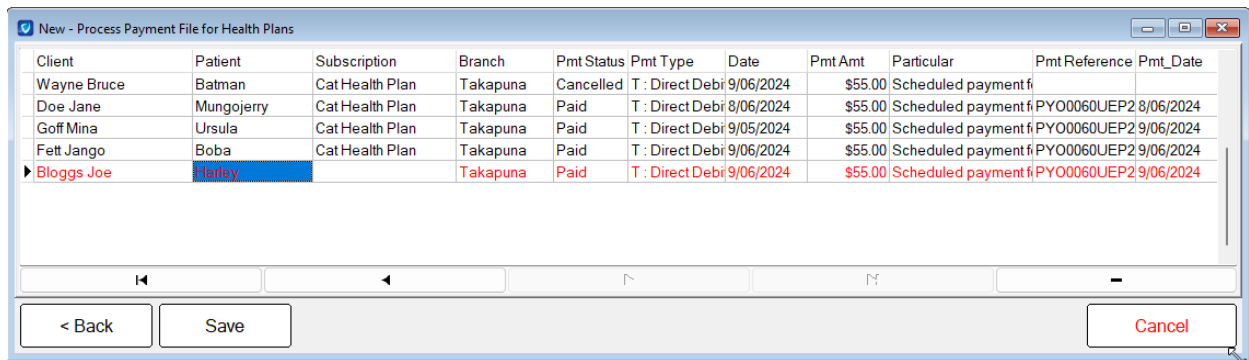
- c. If any row is invalid, click - to ignore that record. This will allow you to process the rest of the records successfully. The ignored line will be coloured red.

charge_date	type	id	invoice_number	subscription_id	description	Client	Patient	Subscription	Branch	Pmt Status	Pmt Type
09 Jun 2024	debit	PYM0060GBJ04S	86956	SUB0060GBJ049	Scheduled paym	Wayne Bruce	Batman	Cat Health Plan	Takapuna	Cancelled	T : Direct De
08 Jun 2024	debit	PYM0060GBKH7V	86957	SUB0060GBKH7E	Scheduled paym	Doe Jane	Mungojerry	Cat Health Plan	Takapuna	Paid	T : Direct De
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09 Jun 2024	debit	PYM0060GBRWC	86958	SUB0060GBRWN	Scheduled paym	Bloggs Joe	Harley		Takapuna	Paid	T : Direct De

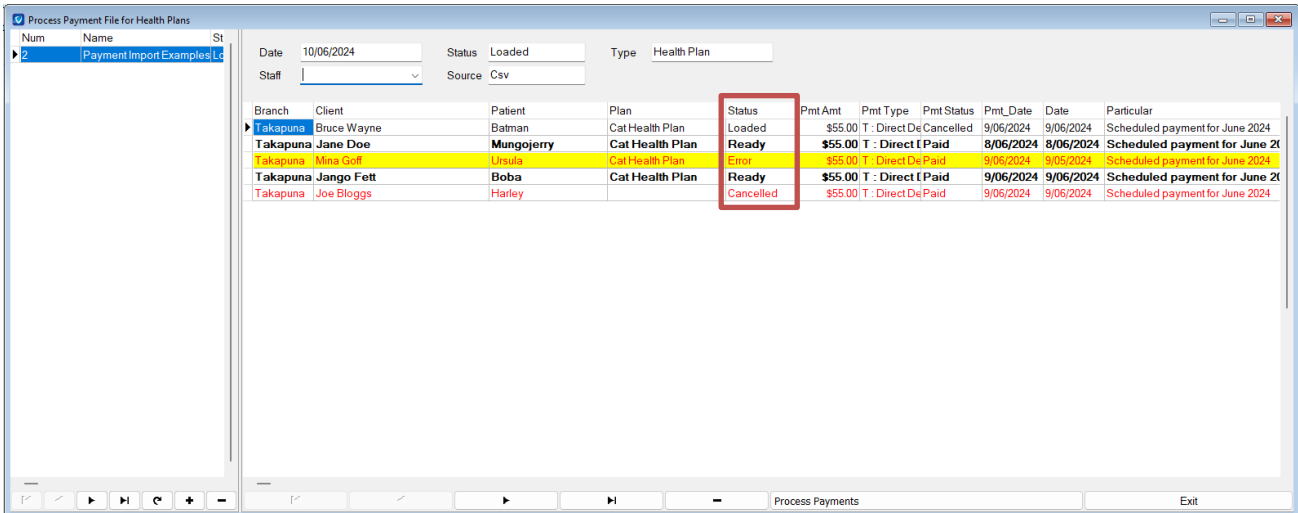
15. Click **Next** to continue. VetlinkPro will also validate data. If any data is missing or incorrect it will report an error which you will need to correct.



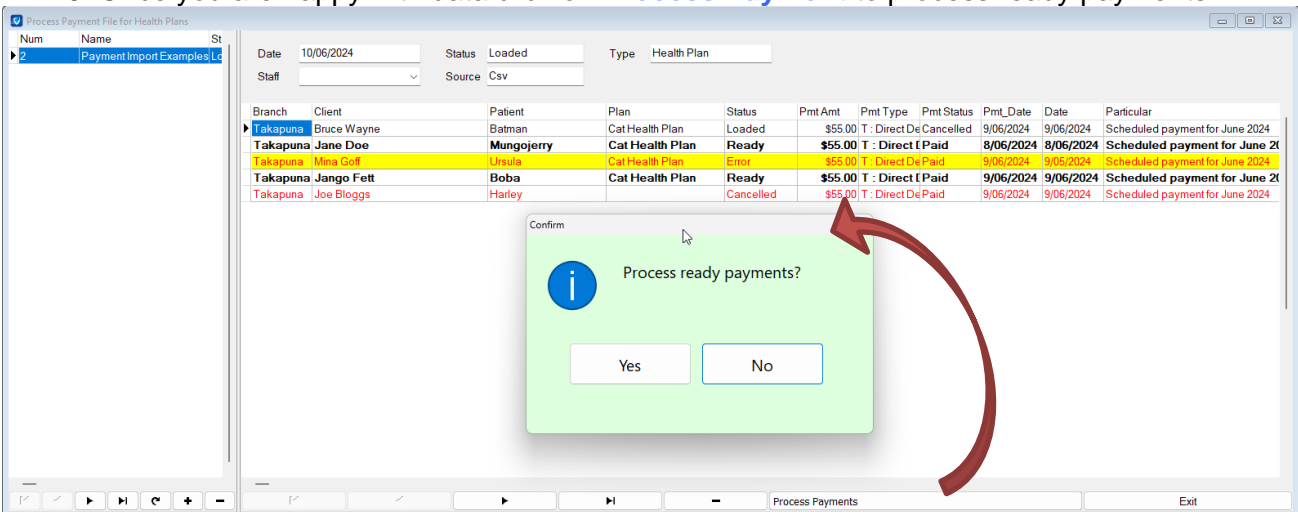
16. Once all data is validated click **Next >** to go to the save screen.



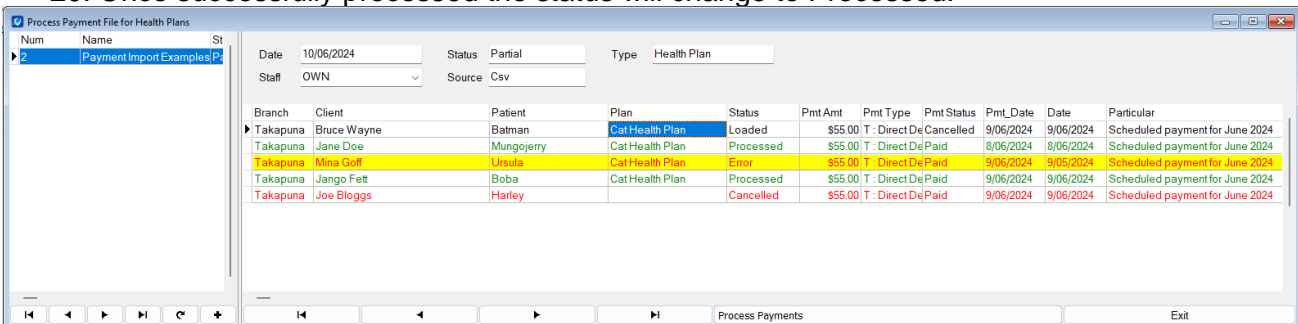
- Click **Save** to save the file on to the database. Once successfully saved it will take you back to the “Process Payment File for Health Plans” screen.
- If all plans are successfully loaded, then the status will be **Ready**, if any errors found then the status will be **Error**.
Note: If no unpaid instalments exist for a client/patient in the period the payment is for the payment will go into error. Even if there is an unpaid instalment in another period.



- Once you are happy with data click on **Process Payment** to process ready payments.



- Once successfully processed the status will change to **Processed**.



Note: Previous FilePay imports are saved on the left hand side of the Process Payment File screen so you are able to look back at previous payments.

