

WELLNESS PLANS

CONTENTS

Overview	2
Wellness Plan Setup	2
Security Levels	2
Creating a Wellness Plan	3
Registering a Patient to a Wellness Plan	5
Redeeming Benefits at Billing	6
Identifying Patient has Wellness Plan	6
Wellness Plan Free Items and Discounts at billing	6
Wellness Plan Transaction Limits	6
Wellness Plan Overdue Instalments / Grace Periods	6
Paying Plan Instalments	7
Plan Payment from Patient Record	7
Plan Payments in Bulk from Recurring Payment Form	7
Renewing plans	8
Automatic Renewing of Plans	8
Renewing Plans where Auto Renew is NO	8
Stopping a Plan from Renewing	8
Exporting Plans for Reporting	9
Create Export	9
Run the Export	9
Terminating a Plan	10
General Information	10
Recurring Invoices (Parasite Control)	10

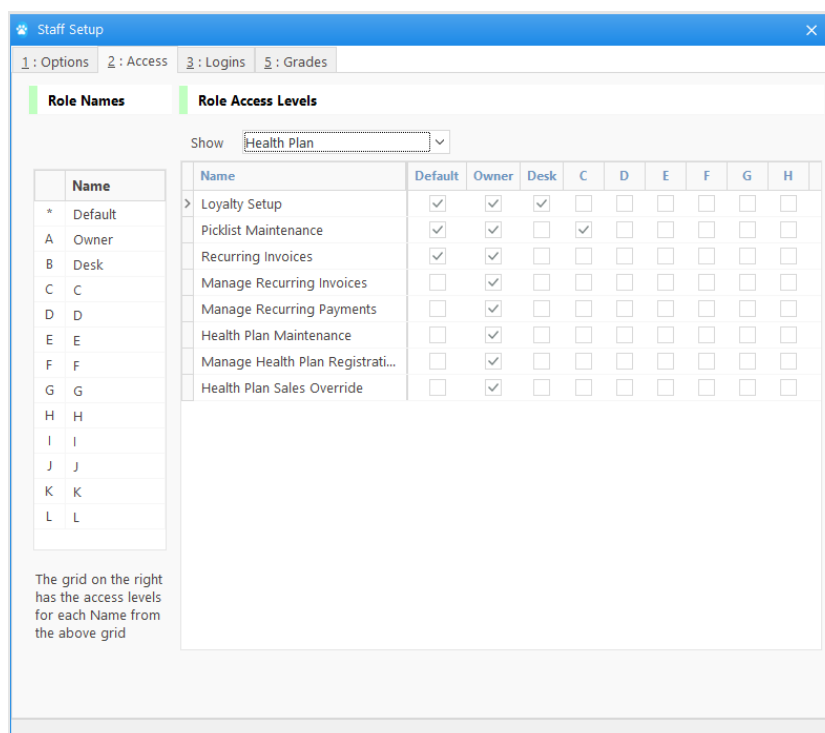
OVERVIEW

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

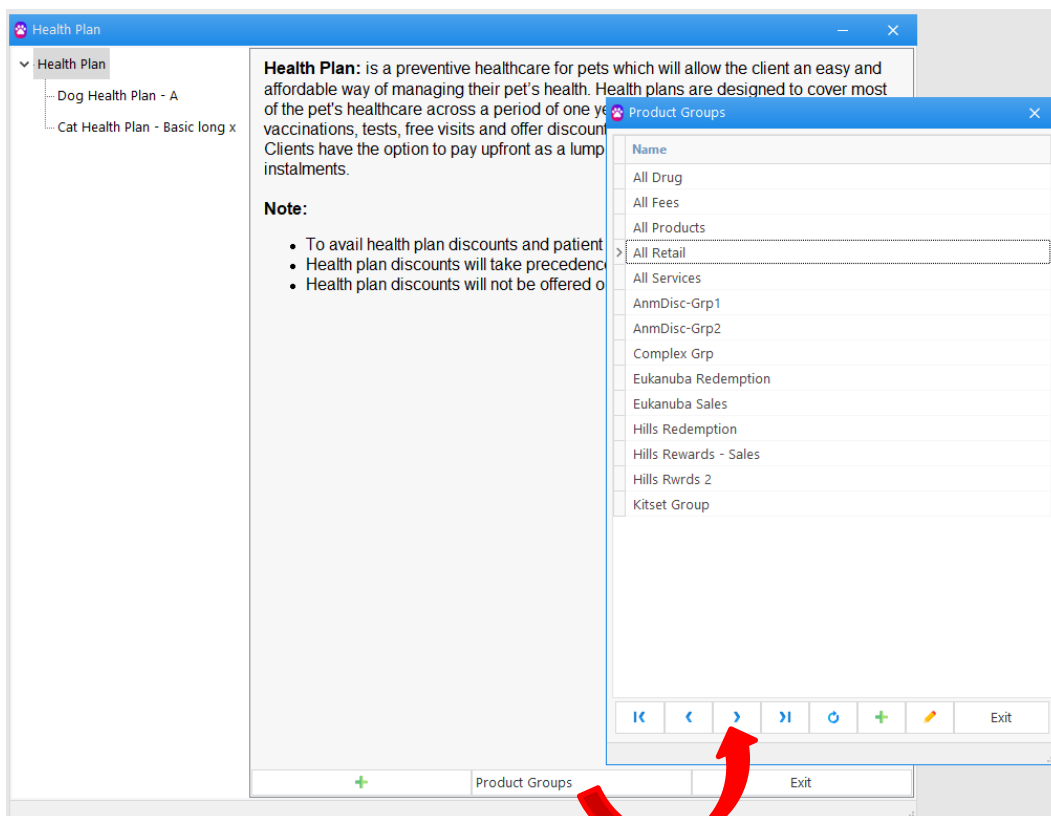
1. **Loyalty Setup:** User access control required for creating/altering any of the loyalty programs in [Options](#) | [Picklists](#) | [Loyalty](#) such as Bonus Points, Purchase Rewards, Client and Patient Discount Scheme and Health Plans
2. **Picklist Maintenance:** User access control required for 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

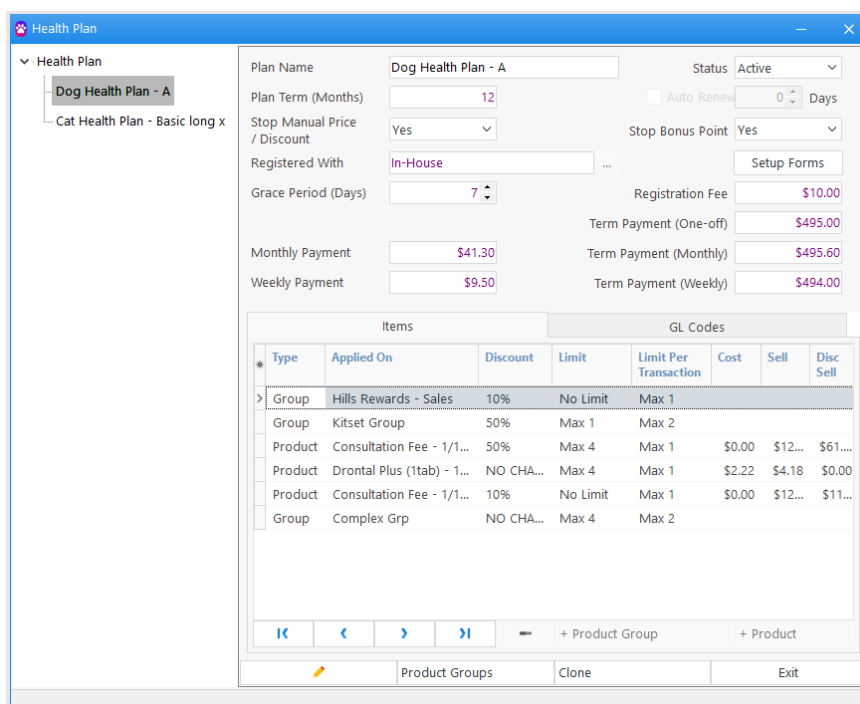
To create a new Wellness Plan, follow the steps below

1. Go to [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 then 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 Limit Per Transaction 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.



REGISTERING A PATIENT TO A WELLNESS PLAN

1. Open the Patient Record
2. Go to [Menu | Loyalty | Health Plan](#)
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 | Menu | 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 | click Action and select Make payment](#).
15. Once the registration is paid the plan will begin.

Loyalty Registration - Dog Health Plan - A registration for Jack

Loyalty Scheme: Dog Health Plan - A Status: Pending

Policy Term: 12 Premium: \$499.20 Reg Fee: \$10.00

Starts On: 13/04/2023 Finishes On: 12/04/2024 Terminated On:

Instalment Payment

Every: Monthly Pay \$41.60 Total Payable: \$509.20

Print Client has accepted the terms and conditions of the policy

Plan Payment Summary

Last Paid On: Last Amt Paid: \$0.00 Total Paid: \$0.00

Overdue Amt: \$0.00 Balance: \$0.00

Plan Sales Summary

Regular Value: Plan Value: Total Disc:

Plan Benefit

Total Paid: \$0.00 Total Disc: Total Benefit: \$0.00

Payment Schedule | Sales | Plan Items

* Type	Date	Bill	Amount	Staff	Due Date	Balance
> Fees	13/04/2...	1/815429	\$10.00	OWN	20/04/2...	\$10.00
Instalment	13/04/2...	1/815431	\$41.60	OWN	20/04/2...	\$51.60

Navigation: Terminate List View Action Exit

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 be 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 B Ruth (2/45112)

B Ruth
0210666200
Owes : \$269.00
Bonus Points : 551
90

Falcon (1/56013)
Dog.Siberian Husk
29/06/2010, Age: ·
Last visit at 8/07/2
Weight: 10.00 on 3

Staff	Type	Qty	Description	RRP (Incl.)	Disc (Incl.)	Price (Incl.)	Store
RS	R	1	1>Consultation Fee	\$123.45		\$123.45	Tak...
RS	R	0.5	1>Dog Health Plan - A-Plan Di..		-\$61.73	-\$61.73	Tak...

+ Add Line

No history added for this visit.
[Click to add](#)

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.

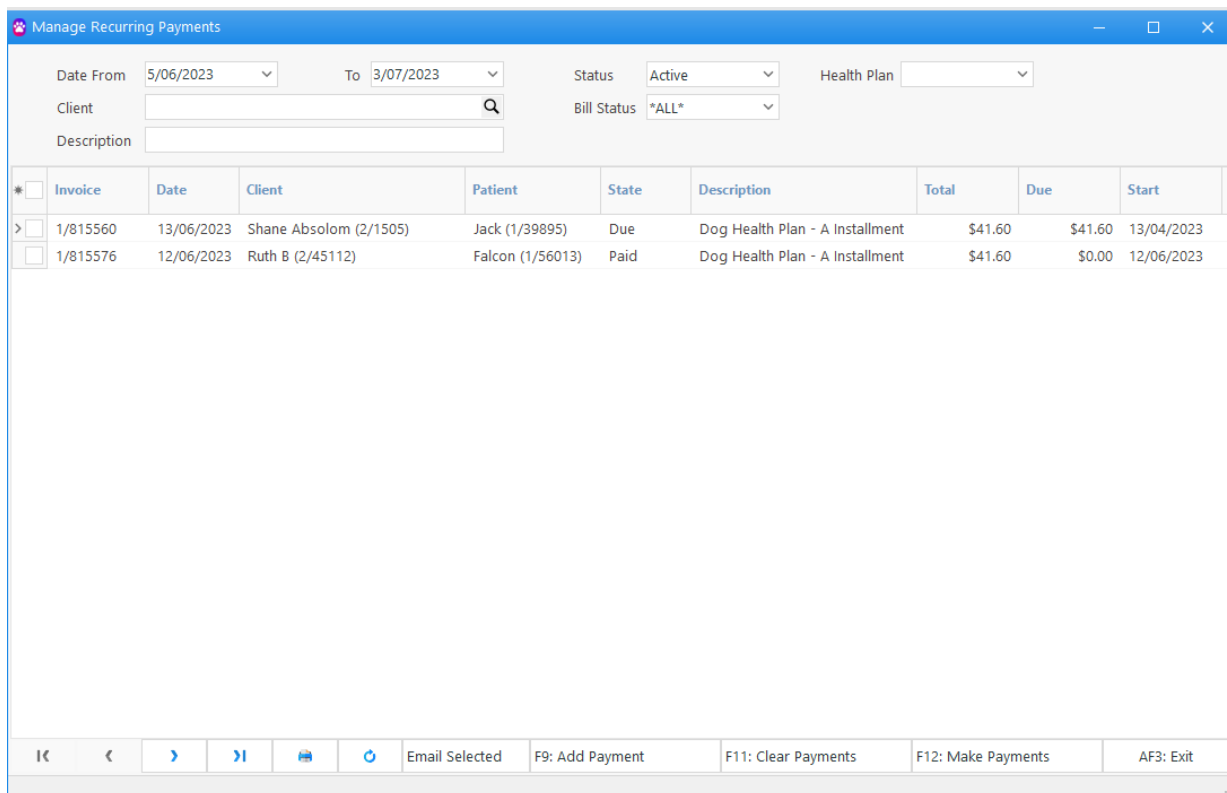
Plan Payment from Patient Record

Go to [Patient Record | Menu | 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 [Billing | Special Functions | Recurring Bills | Manage Recurring Payments](#)
2. Tick the Instalments you want to make payments for
3. Click [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 [Make Payments](#) to process the payments



Manage Recurring Payments

Date From: 5/06/2023 To: 3/07/2023 Status: Active Health Plan: [Dropdown]
 Client: [Search] Bill Status: *ALL*
 Description: [Text Box]

* <input type="checkbox"/>	Invoice	Date	Client	Patient	State	Description	Total	Due	Start
> <input type="checkbox"/>	1/815560	13/06/2023	Shane Absolom (2/1505)	Jack (1/39895)	Due	Dog Health Plan - A Installment	\$41.60	\$41.60	13/04/2023
<input type="checkbox"/>	1/815576	12/06/2023	Ruth B (2/45112)	Falcon (1/56013)	Paid	Dog Health Plan - A Installment	\$41.60	\$0.00	12/06/2023

Navigation: [Icons] 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**

* <input type="checkbox"/>	Num	Name	Client	Email	Patient	Type	Breed	Age	Starts On	Finishes On	Status	Repeats	Amt	Last Pmt	Next Pmt	Overdue	Paid	Remaining
<input type="checkbox"/>	1/39	Dog Health Plan - A	Mrs. Shane Absolom		Jack	Dog	Fox Terrier	15 yr 3 ...	13/04/2...	12/04/2...	Pending	Month	\$41.60			\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	1/42	Dog Health Plan - A	Ruth B		Falcon	Dog	Siberian Husky	13 yr	12/06/2...	11/06/2...	Active	Month	\$41.60	12/06/2...	12/07/2...	\$0.00	\$41.60	\$457.60
<input type="checkbox"/>	1/36	Dog Health Plan - A	Mrs. Denys		Cody	Dog	Boxer	12 yr 8 ...	20/06/2...	19/06/2...	Pending	Month	\$41.60			\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	1/35	Cat Health Plan - Basic long x	Miss Kazuya Tomlinson		Biscuit	Dog	Bull Mastiff	13 yr 4 ...	30/03/2...	29/03/2...	Expired	Month	\$41.60			\$0.00	\$0.00	\$0.00
<input type="checkbox"/>	1/34	Cat Health Plan - Basic long x	Client 03 Test General	nada@cfl.co.nz	007	Cat	Abyssinian		30/03/2...	29/03/2...	Expired	One-off	\$500.00			\$0.00	\$0.00	\$0.00

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 [Field Names 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.