



# Care Plans



**IMPROMED®**

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## Overview

Impromed now has an integration with Covetrus® Care Plans, the leader in preventive wellness care plans. This integration allows businesses to send enrollment links for care plans directly to the client so the client may enroll their pet in a wellness care plan that will import into the Impromed software.

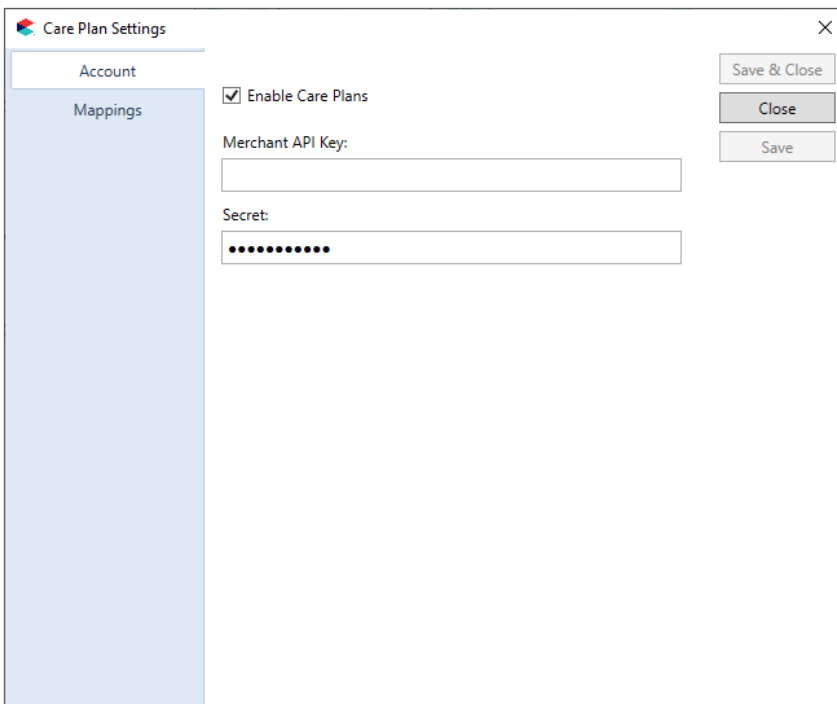
## Setup

Before getting started, some setup is required in Impromed. This setup will require credentials provided by Care Plans. If you do not have the Merchant API Key and Secret, please call 800.315.1780 for assistance with a Care Plans representative.

1. In Impromed, click on the Care Plans button located on the Quick Launch toolbar.



2. Click on **Settings** from the Care Plans drop-down menu. The Care Plan Settings dialog box opens.

A screenshot of the 'Care Plan Settings' dialog box. The dialog has a title bar with a close button (X). On the left, there is a sidebar with 'Account' and 'Mappings' options. The main area contains a checked checkbox for 'Enable Care Plans', followed by two text input fields: 'Merchant API Key' and 'Secret'. The 'Secret' field is masked with dots. On the right side of the dialog, there are three buttons: 'Save & Close', 'Close', and 'Save'.

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## Account Settings

1. Click the check box to **Enable Care Plans**.
2. Enter the **Merchant API Key** and **Secret**.
3. Click **Save**.

## Mappings

When the Merchant key and Secret have been successfully entered and saved, click on **Mappings** to verify client and patient fields match Care Plans.

1. In Care Plan Settings, click on **Mappings**.

Care Plan Information	Client Field	Type
Phone 1	Home Phone	Home
Phone 2	Cell Phone Num	Mobile

Sex Codes	Care Plan Codes
?	
F	Female
FI	Female


  

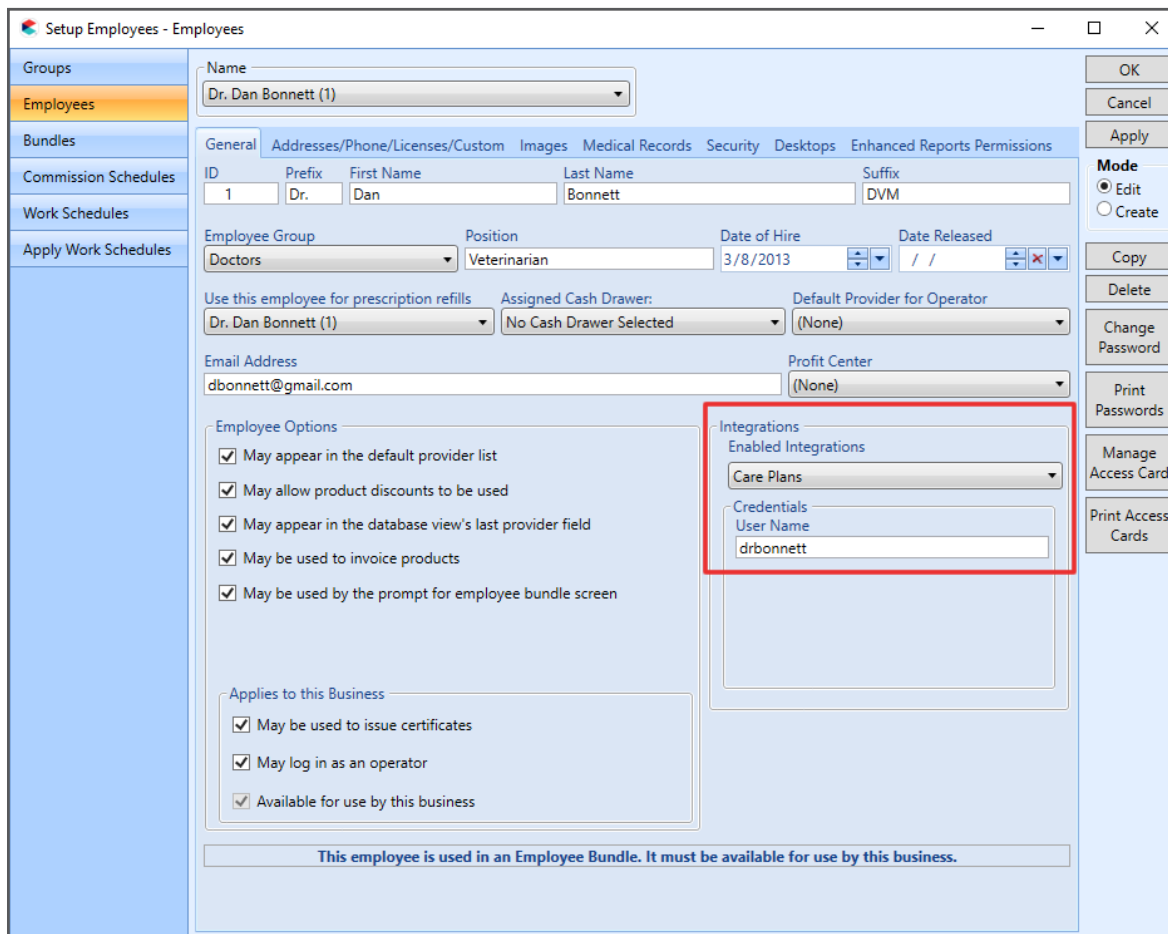
Species	Care Plan Species
Avian	Other
Bovine	Other
Canine	Canine

2. Under **Client Details**, select the phone fields in your database to match **Care Plan Information**.
3. Below **Patient Details**, match the Sex Codes to the **Care Plan Codes**.
4. Under **Patient Species**, match the Improved Species with the **Care Plan Species**.
5. Click **Save** or click **Save & Close** to save the changes and close Care Plan Settings.

## Employee Setup

For the operator to open the Care Plans portal from within Impromed, enter the employee's Care Plans credentials in Employee Setup.

1. Click on  > **Setup > Employees > Employees.**
2. Select the employee who will be using Care Plans.
3. From the **Enabled Integrations** drop-down list, select **Care Plans.**
4. Enter the employee's Care Plans User Name. The user name here must be identical to the user name in Care Plans.



The screenshot shows the 'Setup Employees - Employees' window. The 'Integrations' section is highlighted with a red box. It contains the following fields:

- Enabled Integrations:** Care Plans
- Credentials User Name:** drbonnett

Other visible fields include:

- Name:** Dr. Dan Bonnett (1)
- ID:** 1
- Prefix:** Dr.
- First Name:** Dan
- Last Name:** Bonnett
- Suffix:** DVM
- Employee Group:** Doctors
- Position:** Veterinarian
- Date of Hire:** 3/8/2013
- Date Released:** / /
- Use this employee for prescription refills:** Dr. Dan Bonnett (1)
- Assigned Cash Drawer:** No Cash Drawer Selected
- Default Provider for Operator:** (None)
- Email Address:** dbonnett@gmail.com
- Profit Center:** (None)

Employee Options:

- May appear in the default provider list
- May allow product discounts to be used
- May appear in the database view's last provider field
- May be used to invoice products
- May be used by the prompt for employee bundle screen

Applies to this Business:

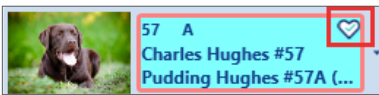
- May be used to issue certificates
- May log in as an operator
- Available for use by this business

This employee is used in an Employee Bundle. It must be available for use by this business.


5. Click **Apply** to save changes.
6. Repeat the steps for each employee who will need access to the Care Plans portal.

## Care Plans

The business needs to work with a representative from Care Plans to setup their care plans so the products and their codes match the products and codes of the business. Once the business has care plans in place, send an enrollment to Care Plans on behalf of a client/patient. After the Care Plans enrollment is sent, the client receives an email or text message with a link to complete the enrollment process. The client then selects a care plan that was created for the business. When the process is complete, the patient's care plan will appear in Impromed. In addition, a care plan icon will appear in the upper right corner of the patient card indicating the patient has an active care plan on their record.

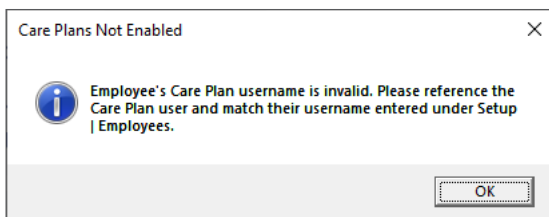


## Care Plans Portal

To open the Care Plans Portal from within Impromed, the **Operator** must have a user name entered in Setup Employees and the user name must be identical to the user name created in Care Plans. The employee then selects the patient with a care plan and clicks on the Care Plans icon located on the Quick Launch toolbar: . As long as everything has been setup correctly, the Care Plans portal will open to the patient's account.



A warning will appear if the operator, who is trying to access the Care Plans portal, does not match the user name entered in Care Plans. Verify the user names are an exact match in Setup Employees in Impromed and in Care Plans. If you need assistance with Care Plans, contact a Care Plans representative at 800.315.1780 ext. 1.



# CARE PLANS

## Example of the Care Plans portal

The screenshot displays a web application interface for a veterinary practice. The top navigation bar includes menus for Home, Invoicing, Customers, Medical Records, Scheduling, Communications, Business, Tools, Help, and Group Chat. A search bar is present with options for Client and Patient Quick Search. The user is logged in as Dr. Dan Bonnett, and the interface shows the profile of a patient named Charles Hughes, a 57-month-old female Labrador Retriever. The main content area is divided into several sections: a welcome message, a navigation bar with Home, Reports, Settings, Profile, Support, and Logout; a customer summary for Charles Hughes (ID: 022368) with a photo and breed information; a Plan Details section listing merchant information, account details, and plan specifics; a Billing Information section showing payment amounts and contract balances; and a Statements section with a table for tracking payments.

Recent Lists

Recent Patients

- 57 A Charles Hughes #57
- Puttting Hughes #57A (...)

Database Find Maps Database Client Quick Search Patient Quick Search Ready to conclude Client (0) Patient (0) Notes Messages Lock Operator Operator: Dr. Dan Bonnett (1) Provider: (None) Defaults Desktop: Owner/OM Lock: MO2655 Refresh Login Chat Submit Feedback Contact Support

Welcome! Dr Dan Bonnett

Home Reports Settings Profile Support Logout

Customer: 022368 - Charles Hughes

**Puttting**

- Puppy Female Canine
- Labrador Retriever (Chocolate)
- On \*Puppy Platinum

**Pet Family**

- Puttting On Canine Complete Care Plan (Cancelled)
- Summer Sunshine On Silver Equine

**Plan Details**

Merchant: Animal Care Clinic  
Name: Charles Hughes  
Customer Since: May 04, 2022  
Plan Id: 1000038999  
Account#: 022368  
Wellness Plan: \*Puppy Platinum  
PIMS Client ID: 57  
PIMS Patient ID: 57A  
Current Services Start on: May 04, 2022  
Current Services Expire on: May 03, 2023  
Plan Status: Active

**Billing Information**

Monthly Payment: \$43.75  
Plan Amount: \$525.00  
Plan Contract Balance: \$481.25  
Unpaid Fees: \$0.00  
Final Scheduled Billing Date: Apr 04, 2023  
Remaining Scheduled: 11

**Balance Due Now**  
\$0.00

**Next Payment**  
Jun 04, 2022

**Last Payment**  
\$56.75 on May 04, 2022

Statements/Payments  
Make Payment

**Statements**

Date	Statement#	Amt
------	------------	-----

Recent Clients

Recent Patients

Current Invoices

Today's Reservations

Today's Appointments

Stables

Trainers

## Care Plans - Send Enrollment

If your veterinary business is using Care Plans for your wellness plans, send an enrollment on behalf of your clients and their pets directly to Care Plans via your Improved practice management software.

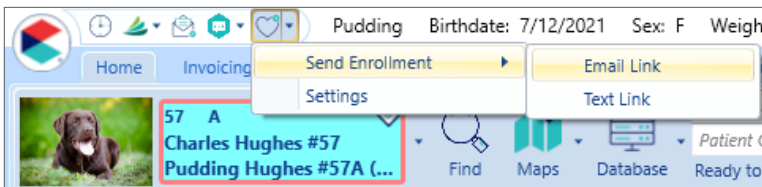
Before sending an enrollment, be sure to setup Care Plans first. Refer to “Setup” on page 3 for more information.



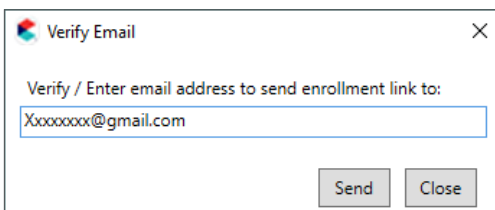
**The Care Plans integration will NOT be supported on Windows Server 2012R2 and Windows 8.1 because of security protocols which are not supported on those systems.**

### Sending Enrollment via Email

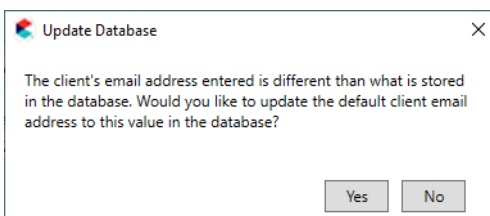
1. From the Quick Launch Toolbar, click on **Care Plans > Send Enrollment > Email Link**.



2. The Verify Email opens and will populate with the client's email address stored in their client record.



3. If the client wants the enrollment sent to a different email address, enter that email in place of the default address. If the email entered is different than what is on their record, a prompt to update the client's database record will appear.



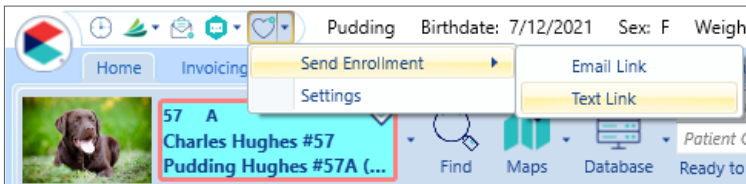


# CARE PLANS

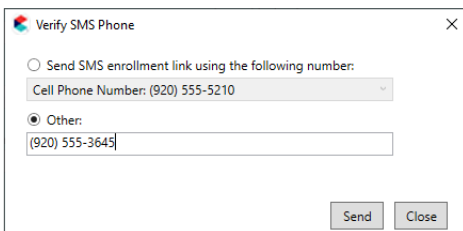
4. Click Yes to update the client's email address in their record. Click No to keep their original email address on record but use the one entered to send the enrollment.
5. The client will receive an email with instructions to sign up for care plans.

## Send Enrollment via Text

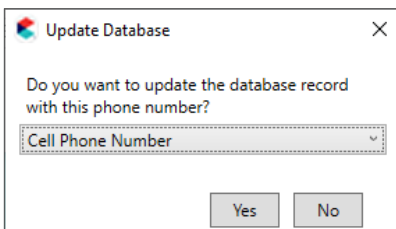
1. From the Quick Launch Toolbar, click on **Care Plans > Send Enrollment > Text Link**.



2. The Verify SMS Phone will populate with the client's phone number stored in their client record.



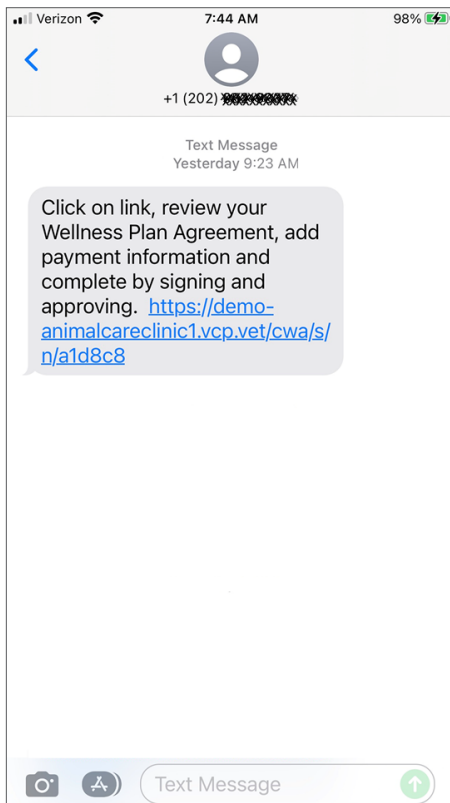
3. If the client wants the enrollment sent using a different phone number, enter that number in place of the default phone. If the phone entered is different than what is on their record, a prompt to update the client's database record will appear.



4. If updating the client record, select which phone field to update from the drop-down list. Click Yes to update the client's phone in their record.
5. Click No to keep their original phone on record but use the phone entered to send the enrollment.

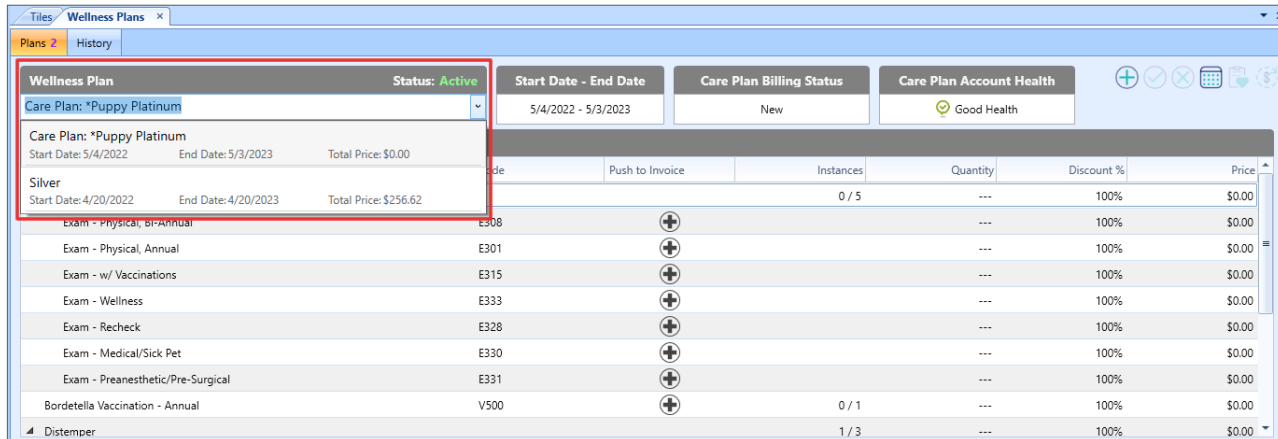
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- The client will receive a text message similar to the one displayed below. The client will click the link and follow the on-screen instructions to setup and purchase a care plan.

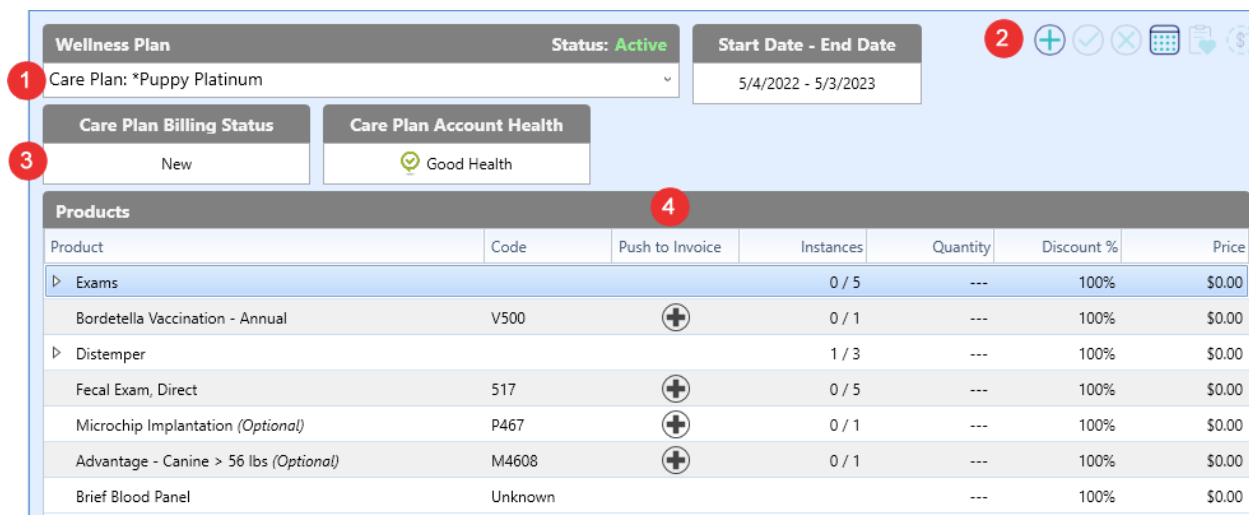


## Displaying Care Plans

It is possible for a patient to have an Improved wellness plan and a Covetrus Care Plan. Below is an image of a patient who has both types of plans. Note that “Care Plan:” will precede a Covetrus care plan, whereas an Improved wellness plan will only display the name of the plan.




After the client has successfully completed the purchase of a Care Plan, the plan will appear on the patient's wellness plan in Improved. Below is an image of the care plan.



### Areas of the Care Plan Screen

1. The name of the care plan and its status appears under Wellness Plan.
2. Additional plans can be added to the patient's account. However, if a Care Plan is selected, as shown in the image, the other buttons are grayed out as they pertain only to Improved wellness plans.

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3. If a Care Plan is selected, as shown, **Care Plan Billing Status** and **Care Plan Account Health** will appear on the plan.
4. For all wellness/care plans, operators click the  icon to push the plan item to the invoice. For Care Plans, the items will go to the invoice with a zero charge because Care Plans will handle care plan payments.



**If an item is added to the invoice via Patient Processing or Invoices, and the item is part of a Care Plan, the instances are tracked in the Wellness Plans module.**

## More about Care Plans

- Users can set the order of care plan items in Care Plans and the order will display in Wellness Plans.
- Out-of-plan discounts configured in Care Plans will import and display in the Benefits section of Wellness Plans.
- Product groups have been created in the Wellness Plans product grid to accommodate Care Plans and the services provided within the care plan.
- Care Plans are displayed on the History tab of the Wellness Plans module and the Search Filter has been updated to include Care Plans.
- The Desktop automatically refreshes and updates Care Plans but they can be manually updated by pressing F5 or clicking on the Refresh button.
- If a patient has a care plan about to expire and the plan automatically renews, Impromed can receive those updates and will reflect the plan details.
- When the Wellness Plan, Invoicing, or Patient Processing modules refresh and collects new plan details for a patient with a Care Plan, when the plan updates the sub-service codes, Impromed receives those updates and will reflect the plan details.
- If the product is on an open invoice and the plan has been updated to no longer provide the sub-service as part of the plan, Impromed will leave the product on the invoice, but remove the wellness plan association so it will still charge the pet owner for services provided. At this point, the business can then remove it manually from the invoice if they want to change it.
- If there are changes to the invoice due to plan updates, a warning will display to the operator to “Please review the invoice because of recent Care Plan changes”.
- Impromed will not update closed invoices and will not update top level code changes outside of optional services added.