# Wellness Plans

AVIMARK®

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# Overview

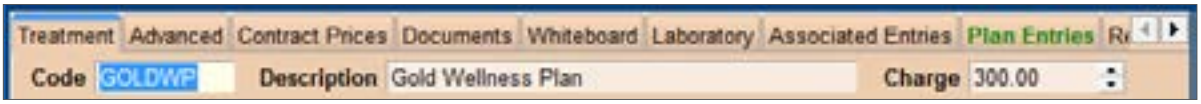
Avimark's Wellness Plans have been improved for ease of use and increased efficiency. Wellness Plans is a great way to apply automatic discounts for treatments, apply courtesy discounts on other items on the plan, and generate automatic reminders for plan renewal.

This guide is for Avimark Wellness Plans. For more information about Covetrus® Care Plans available with Avimark version 21.31.0 or higher, refer to the guide Care Plans for Avimark.

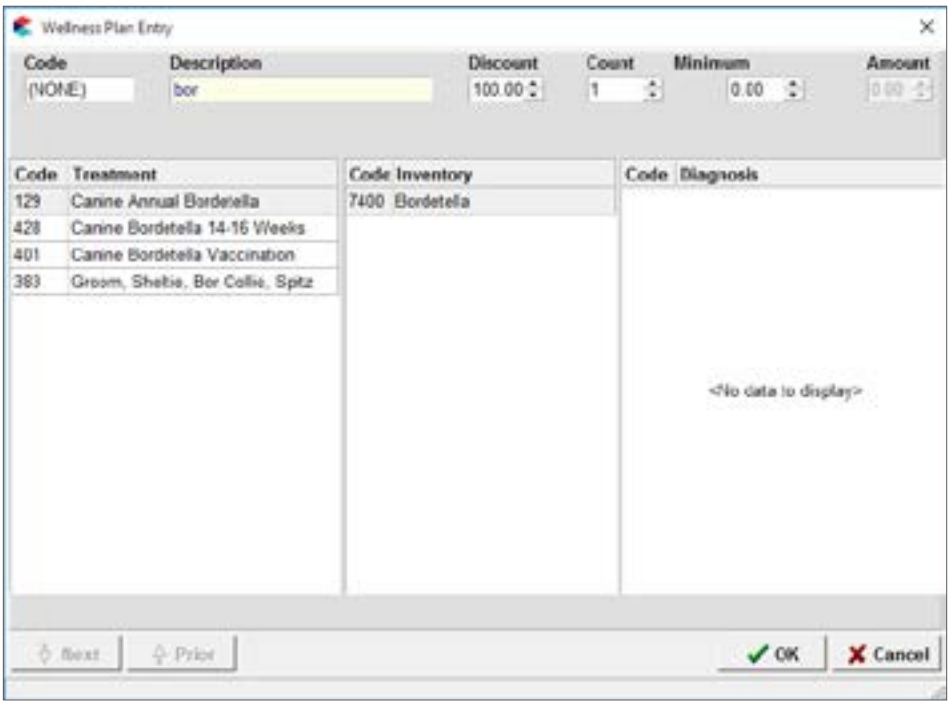
# Basic Setup

All plan information is stored in the Treatment List. Therefore, to create a Wellness Plan, you want to have a Treatment created for the plan.

1. From the menu, click on **Work with > Treatment List**.
2. It is recommended you create a **New Category** labeled **Wellness Plans**.
3. With the Wellness Plans category selected and your mouse under **Records for Wellness Plans**, **right-click** > **New**.
4. Enter the **Code** and **Description** for the new Wellness Plan.
5. Enter the **Charge** for the plan.




6. Click on the tab labeled **Plan Entries**. Click **Yes** if prompted to save the treatment.
7. Click **Yes** if prompted to add a Wellness Plan to this treatment.
8. **Right-click** > **New** to add treatments or inventory items to the plan.
9. Enter the **Code** or **Description** to search for the item.
10. Double-click to select the item then, if applicable, change the **Discount**, **Count**, **Minimum**. See "Entry Options" on page 6.
11. Click **OK** to add the item to the plan.




You can also right-click > Choose and add several items to the plan at once. Then select an item, right-click > Change to modify the item's Discount, Count, Minimum, and add Alternative Codes.

# Advanced Setup

We will take a look at the options for a Wellness Plan Entry and adding Alternative Codes.

## Entry Options

After selecting an item, you can now define the item's Discount, Count, and Minimum.

- **Discount** is used to determine the percentage of discount this particular service is to receive. The default discount is 100%. However, in the case of, grooming, for example, where the cost of grooming can widely vary, you may want to give an 80% discount leaving the client to pay 20% of the grooming cost.
- **Count** is the number of times this service is to be performed and covered by the plan. Using the grooming example, the Count may be 2. This means the client can bring their pet in twice for grooming services during the duration of the plan.
- **Minimum** is the charge for the service if the discount is not 100%. In the case of our Bath by groomer, we will give an 80% discount for grooming; however, the client pays at least $20.00 for grooming or 20% of the cost - whichever is highest.

## Alternative Codes

Alternative Codes are additional items that can be selected for the plan if the main plan entry is not valid. In our example of grooming, we have the main code as "Bath by groomer". But if a client has a large breed dog with a double coat, there is more work involved with grooming this pet. Therefore, when this patient comes in for grooming and is on the plan, we can add the Bath, Canine Large Double Coat in place of the Bath by groomer.

## Modify a Plan Entry

1. From the **Plan Entries** tab, select a plan entry.
2. **Right-click** > **Change** or **double-click** on the entry to edit the selected item.
3. Modify the entry options, if necessary.

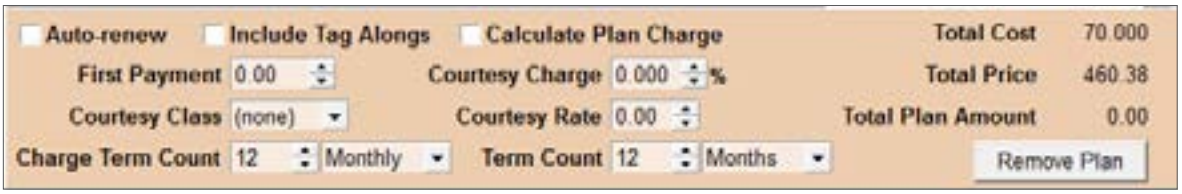
4. Under **Alternative Codes**, **right-click** > **New**.
5. Search for items by Code or Description.
6. Double-click on an item to select it then click **OK**.
7. Repeat to add additional Alternative Codes.
8. Click **OK** to close the Wellness Plan Entry screen.

**You can also right-click > Choose and add several items to the plan at once.**

**To remove an item from Alternative Codes, right-click > Remove.**

# Plan Entry Tab Options

Here we will take a closer look at the options located at the bottom of the Plan Entries tab.




- **Auto-renew** - If checked, the plan automatically renews once the end of the term has been reached.
- **Include Tag Alongs** - If checked, applies the plan discount to any associated entries attached to the included services. Leaving this option unchecked means Avimark will charge normal pricing for tag alongs or apply the Courtesy Rate, if one is defined.

**Any associated or linked entries to included services will automatically be included in the plan when the parent treatment is administered.**

- **Calculate Plan Charge** - Avimark will automatically open the Plan Charges screen at the time the Wellness Plan is placed in the patient's Medical History. From within this window you will be able to define recurring charges.
- **First Payment** - This is the up front payment the client is responsible for when they purchase the plan.
- **Courtesy Charge** - The amount entered here can be used to cover fees such as processing fees and other miscellaneous fees.
- **Courtesy Class** - Choose a Client Discount Class in this field. The discounts associated with this client class will be applied to the patient.

- **Courtesy Rate** - Specify the percentage discount to be allowed on all treatments and items not covered under the plan.
- **Charge Term Count** - Enter a default number of recurring payments.
- **Term Count** - Defines the length of the plan. In this field, specify the number entered as Days, Weeks, Months, or Years.
- The **Cost, Total Price**, and **Total Plan Amount** are displayed at the bottom right side.
- **Remove Plan** - Once a treatment has been marked as a Plan, the only way to undo the Wellness Plan on the treatment is to click the Remove Plan button. This will remove all information on the Plan Entries tab and remove the Wellness Plan from any patients that might be associated with it.

# Selling a Wellness Plan

Selling a Wellness Plan means adding the plan to a patient's Medical History.

## Add a Wellness Plan to Medical History

1. In a patient's Medical History, **right-click** > **Choose** > **Treatments**.
2. Select the Wellness Plan category then select the Wellness Plan.
3. Click **Done**.
4. If prompted, select the Wellness Discount to apply to items not covered in the plan.

This will list the current Wellness Plan being sold along with other active plans for this patient and the option to choose **Best Available**. If you wish to only apply the class discount set up on this client or patient, you can choose **Keep Patient Class Discount**. ***NOTE:*** A patient class discount overrides the client class discount. Select the desired discount option.

Now when a non-plan service is sold, Avimark will apply the discount rate that was chosen here.

**If in Options Maintenance you set the Wellness Plan Discount to Wellness Plan Only or Best Available, Avimark will automatically apply those discounts and not let you choose a discount option after the Plan is sold. See "Discount Options" on page 11.**

5. Click **OK**.

With the Wellness Plan entered into the patient's Medical History, the plan name and expiration date will be automatically viewable from the patient area.

6. Complete the process of selling the Wellness Plan by posting or creating an invoice.

## Recurring Charges

If the Calculate Plan Charge option was selected when creating the Wellness Plan, a Wellness Plan Recurring Charges window will open when the plan is added to Medical History. From within the Wellness Plan Recurring window you can set how the client will pay for the plan.

- **Total** - This is the total price of the Wellness Plan.
- **First Payment** - If the first payment was entered when setting up the plan, that value carries over to the Recurring Charges screen.
- **Payment Remaining** - This is the balance due for the Wellness Plan.
- **Term** - The length of the plan can be defined when setting up the plan; however, the term can be modified here.
- **Payment Account** - If the client has a credit card number stored within Avimark Payment Solutions, select the credit card from the drop-down list or right-click > New to add a card on the fly. Leave this field blank if clients will be paying the balance of the plan with cash or check.
- **Payment Amount** - With first payment, term, and payments defined, the amount to be charged will display in this field. The amount can be altered, if necessary.

- **Next Charge** - This is the date for the next payment but can be altered.
- **Courtesy Charge** - You can use this field to set a processing fee or other fee for the plan.
- **Set Charge Plan** - Click this button to apply the recurring charges.
- **Apply Full Charge** - Click this button if the client wishes to pay the full amount of the plan.

**The full tax amount will be included in the first initial payment even if the client has setup recurring payments.**

## Altering Recurring Payments

### Using Avimark Payment Solutions

1. **Right-click** in the Client area then select **Recurring Payments**.
2. Double-click on the recurring payment.
3. Modify the payments remaining, amount, or date.
4. Click **OK** to save changes.

### Without Avimark Payment Solutions

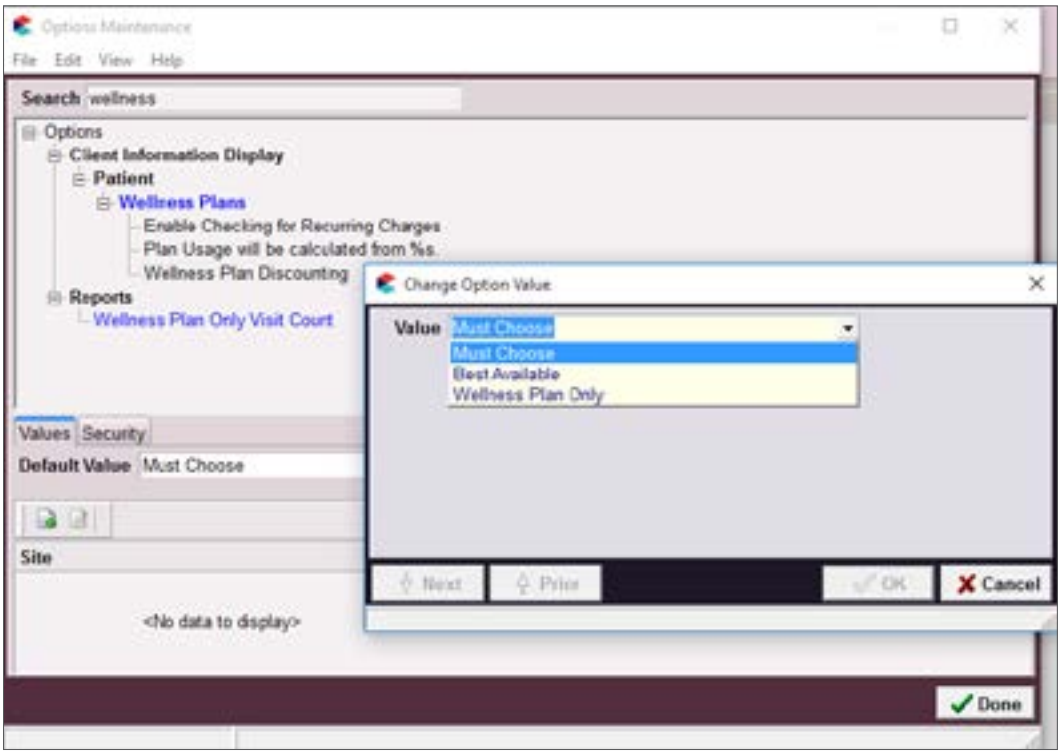
1. From the Patient area, **right-click** > **Wellness Plans**.
2. On the appropriate plan, **right-click** > **Recurring Charge**.
3. In the **Recurring Charges** screen, change the **Payment Account**, **Payment Term**, and the **Next Charge** date.

## Wellness Plan Discounting

Services not included in a Wellness Plan can either be discounted or not, during the plan term. The plan discounts for non-included services are known as Courtesy Discounts. Another form of discounting is the use of Client or Patient Discount Classes. For a Wellness Plan, choose if you wish to apply the Wellness Plan Discount, maintain the Client\Patient Class discount, or automatically apply the Best Available discount.

## Discount Options

1. Click the Advanced Options button to open **Options Maintenance**.
2. Search for *wellness*.
3. Select the option, **Wellness Plan Discounting**.
4. Click **Change** for Default Value.




5. Select one of the following options:
   - **Must Choose** will display a discount window, after a plan is sold, allowing you to choose which discount to apply. This discount will only be active while the plan is active. Avimark will set Must Choose as the default value for this new Discounting Advanced Option.
   - **Best Available** means all discounts are considered and applied based on the best discount available: individual wellness plan discounts, patient discounts, and client discounts.
   - **Wellness Plan Only** will override existing discounts and apply the plan Courtesy Discount defined. If both Courtesy Rate and Courtesy Class are defined, Avimark will compare these two discounts and apply the Best Available discount. If a second Wellness Plan is administered, its discount will override the previous Wellness Plans. Also, if the Wellness Plan discount is selected but no Courtesy Discount is defined on the plan, Avimark will not apply a discount to the non-plan services.

# Viewing Plan Information

Once a Wellness Plan has been added to a patient's Medical History, the services performed and those yet to be performed can be viewed from the patient's record.

1. From the **Patient Area**, **right-click** > **Wellness Plans** or select Wellness Plans under Attachments.
2. In the patient's Wellness Plans window, **right-click** > **Included Services**. This will display the services performed and the services remaining. For services that are to be performed a number of times during the plan term, Avimark will display the Quantity yet to be performed.
3. Under **Services Unperformed**, **right-click** > **Post** to post the service to Medical History.
4. **Right-click** > **View Alternate Codes** to view any alternate codes associated with the service or item. This will open an Alternate Entries window. From within this window you can **right-click** > **Post** to post the entry into the patient's Medical History.

# Upgrading or Canceling Plans

## Upgrading

A patient's Wellness Plan can be upgraded to another plan of higher value.

1. In the Patient area, click the Wellness Plans option under **Attachments** or **right-click** and select **Wellness Plans**.
2. Left-click on the Wellness Plan that you would like to upgrade and **right-click > Upgrade Plan**. Avimark will display plans that are of greater value than their current plan.
3. The codes in common between the current Wellness Plan and the potential upgraded Wellness Plan will display in a **bold** font.
4. Select the Wellness Plan to upgrade to and click **Done**. You will need to confirm you wish to upgrade to the selected Wellness Plan, then the Recurring Charges window will appear if the option to do so was selected on that plan.
5. The **Total** will display the difference between the two plans and a **First Payment** can be entered, if applicable.
6. Click the button, **Set Charge Plan**. Avimark will cancel the current plan and begin calculating from the Wellness Plan the client upgraded to.
7. The current Wellness Plan name will now appear in the Plan field in the Patient area and the expiration date will stay the same.

8. A code of $UPG$ upgrade line will be placed in the patient's Medical History and CANNOT be removed by a **right-click** > **Remove in Medical History**.

**Upgraded plans will show two entries in Accounting each month; one for the original plan charge and a second for the difference in the original and upgraded plan amounts.**

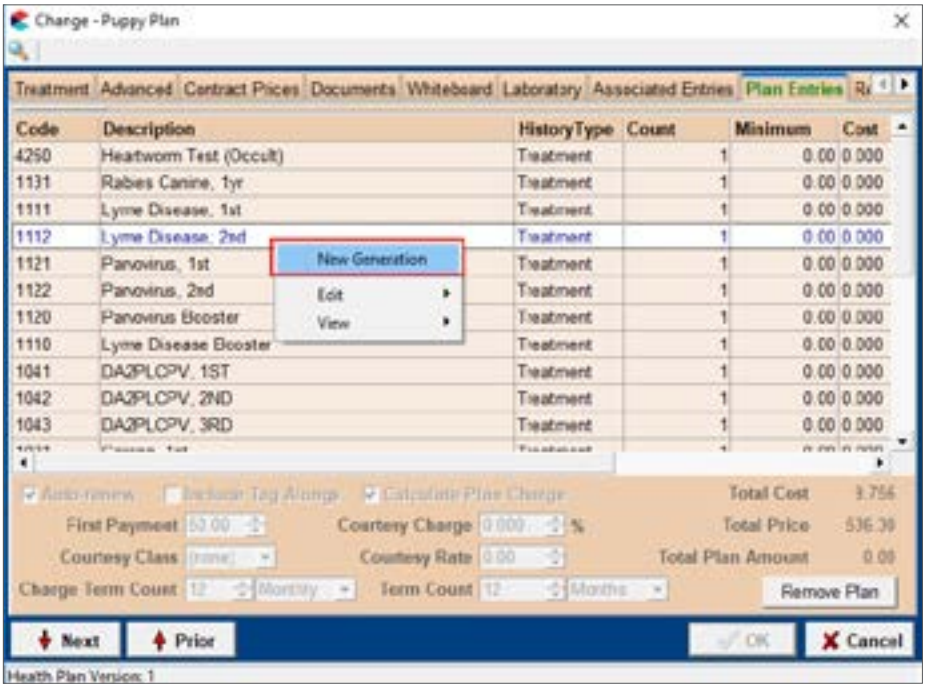
## Canceling a Wellness Plan

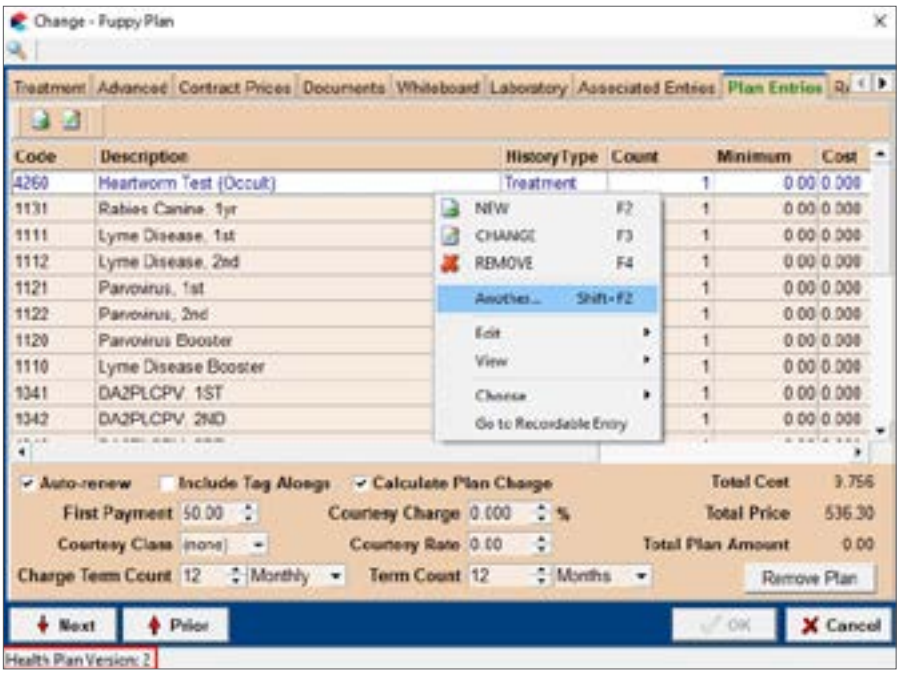
A plan can be canceled from within the Patient Wellness Plans window. Choose the Wellness Plan then **right-click > Cancel Plan**.

Avimark will calculate the usage and remove the plan from the patients plan history. If you wish to refund any portion of the plan to the customer, you can calculate the usage which will show the total of services performed and unperformed allowing you to make a decision on an appropriate amount to refund.

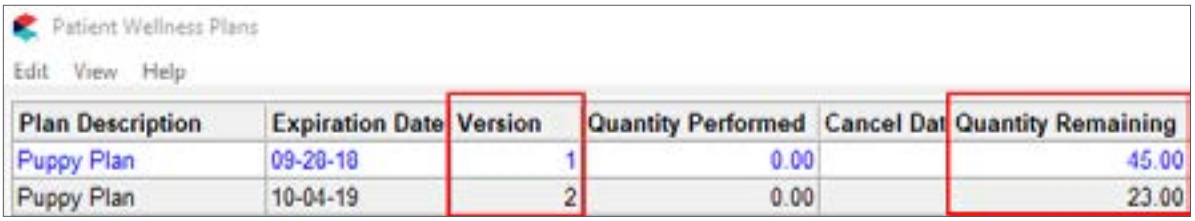
# Wellness Plan Versions

Versioning allows clinics to alter Wellness Plans throughout the year and is not retroactive to the patient already on that Wellness Plan.

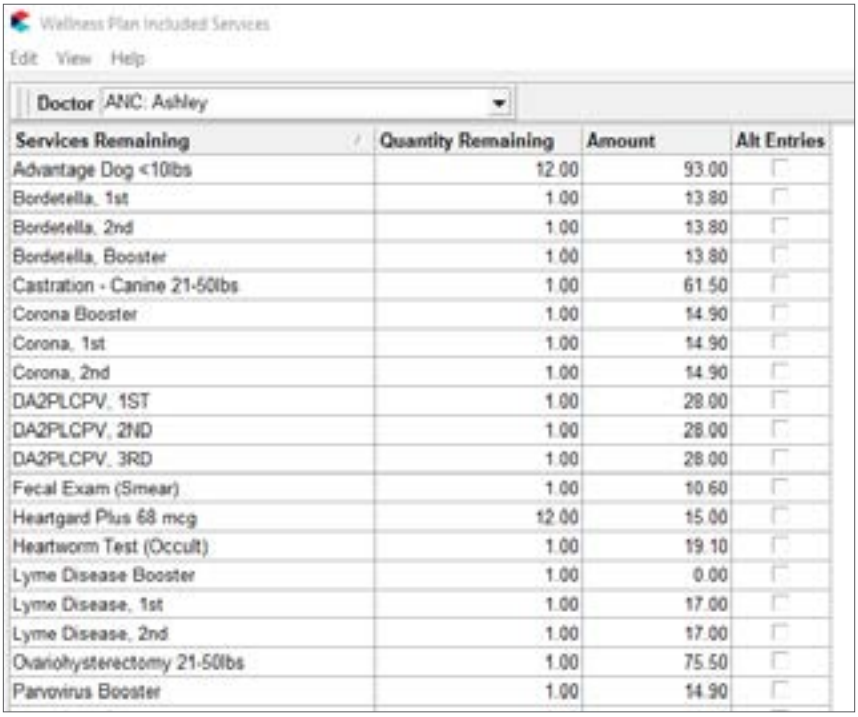





Below is an example of a patient who has two Wellness Plans, one expired and one active, each are on different versions. In addition, the images below show the difference in the two versions.




| Plan Description | Expiration Date | Version | Quantity Performed | Cancel Dat | Quantity Remaining |
|---|---|---|---|---|---|
| Puppy Plan | 09-28-18 | 1 | 0.00 | | 45.00 |
| Puppy Plan | 10-04-19 | 2 | 0.00 | | 23.00 |

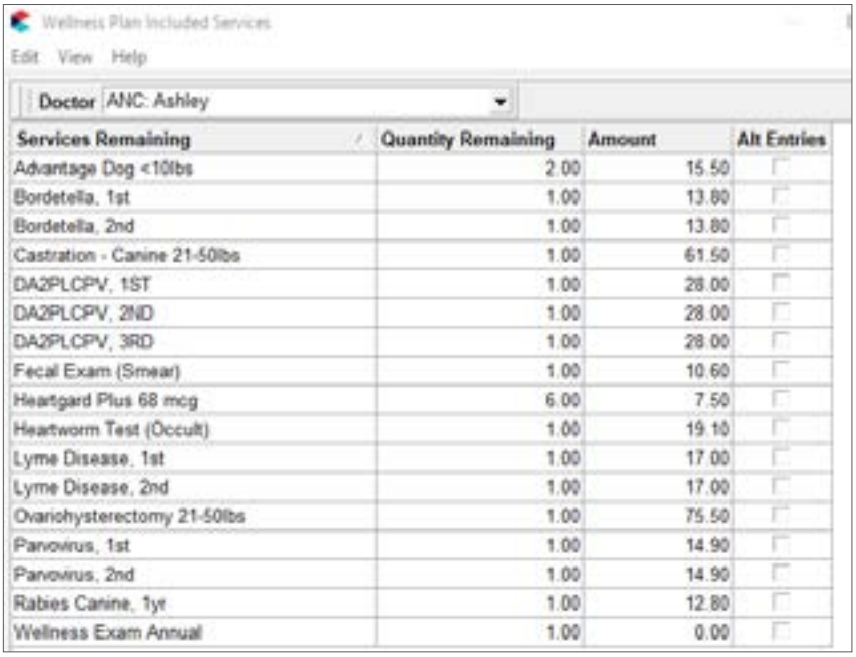


Wellness Plan Included Services

Edit View Help

Doctor ANC: Ashley

| Services Remaining | Quantity Remaining | Amount | Alt Entries |
|---|---|---|---|
| Advantage Dog <10lbs | 12.00 | 93.00 | |
| Bordetella, 1st | 1.00 | 13.80 | |
| Bordetella, 2nd | 1.00 | 13.80 | |
| Bordetella, Booster | 1.00 | 13.80 | |
| Castration - Canine 21-50lbs | 1.00 | 61.50 | |
| Corona Booster | 1.00 | 14.90 | |
| Corona, 1st | 1.00 | 14.90 | |
| Corona, 2nd | 1.00 | 14.90 | |
| DA2PLCPV, 1ST | 1.00 | 28.00 | |
| DA2PLCPV, 2ND | 1.00 | 28.00 | |
| DA2PLCPV, 3RD | 1.00 | 28.00 | |
| Fecal Exam (Smear) | 1.00 | 10.60 | |
| Heartgard Plus 68 mcg | 12.00 | 15.00 | |
| Heartworm Test (Occult) | 1.00 | 19.10 | |
| Lyme Disease Booster | 1.00 | 0.00 | |
| Lyme Disease, 1st | 1.00 | 17.00 | |
| Lyme Disease, 2nd | 1.00 | 17.00 | |
| Ovariohysterectomy 21-50lbs | 1.00 | 75.50 | |
| Parvovirus Booster | 1.00 | 14.90 | |



Wellness Plan Included Services

Edit View Help

Doctor ANC: Ashley

| Services Remaining | Quantity Remaining | Amount | Alt Entries |
|---|---|---|---|
| Advantage Dog <10lbs | 2.00 | 15.50 | |
| Bordetella, 1st | 1.00 | 13.80 | |
| Bordetella, 2nd | 1.00 | 13.80 | |
| Castration - Canine 21-50lbs | 1.00 | 61.50 | |
| DA2PLCPV, 1ST | 1.00 | 28.00 | |
| DA2PLCPV, 2ND | 1.00 | 28.00 | |
| DA2PLCPV, 3RD | 1.00 | 28.00 | |
| Fecal Exam (Smear) | 1.00 | 10.60 | |
| Heartgard Plus 68 mcg | 6.00 | 7.50 | |
| Heartworm Test (Occult) | 1.00 | 19.10 | |
| Lyme Disease, 1st | 1.00 | 17.00 | |
| Lyme Disease, 2nd | 1.00 | 17.00 | |
| Ovariohysterectomy 21-50lbs | 1.00 | 75.50 | |
| Parvovirus, 1st | 1.00 | 14.90 | |
| Parvovirus, 2nd | 1.00 | 14.90 | |
| Rabies Canine, 1yr | 1.00 | 12.80 | |
| Wellness Exam Annual | 1.00 | 0.00 | |

# Refactored Wellness Plan Renewals

When a Wellness Plan is renewed, it will renew to the most recent version. If the patient was on version 1 initially, but now that particular Wellness Plan is on version 2, when the plan auto-renews it will renew to version 2.

# Wellness Plan Indicators

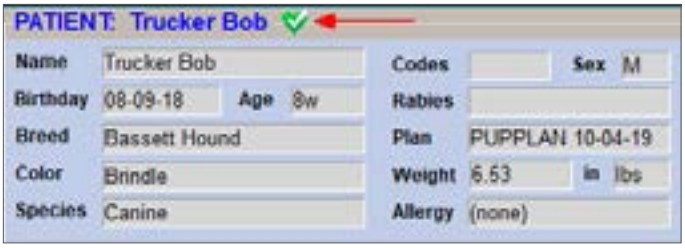
## Wellness Icon

- **Green: Active**
- **Yellow: Expires within 30 days**
- **Red: Expired**

## Advanced Option for Displaying Expired Wellness Plan Icons

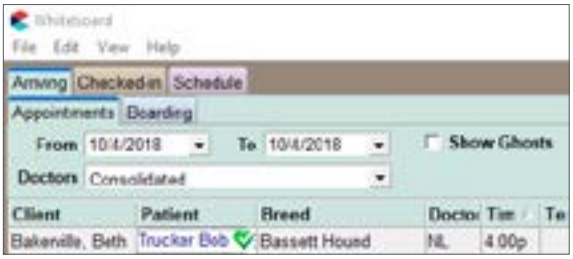
- Set **Display Wellness Plan Indicators** to **True** to activate the icons in Avimark.
- Set **Display Expired Wellness Plan Indicators for # Days** to how long the practice chooses to see the Expired icons (red), this is only needed if the clinic does NOT run recurring charges.

## CID Plan Indicator

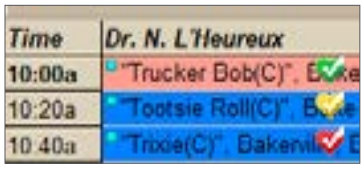


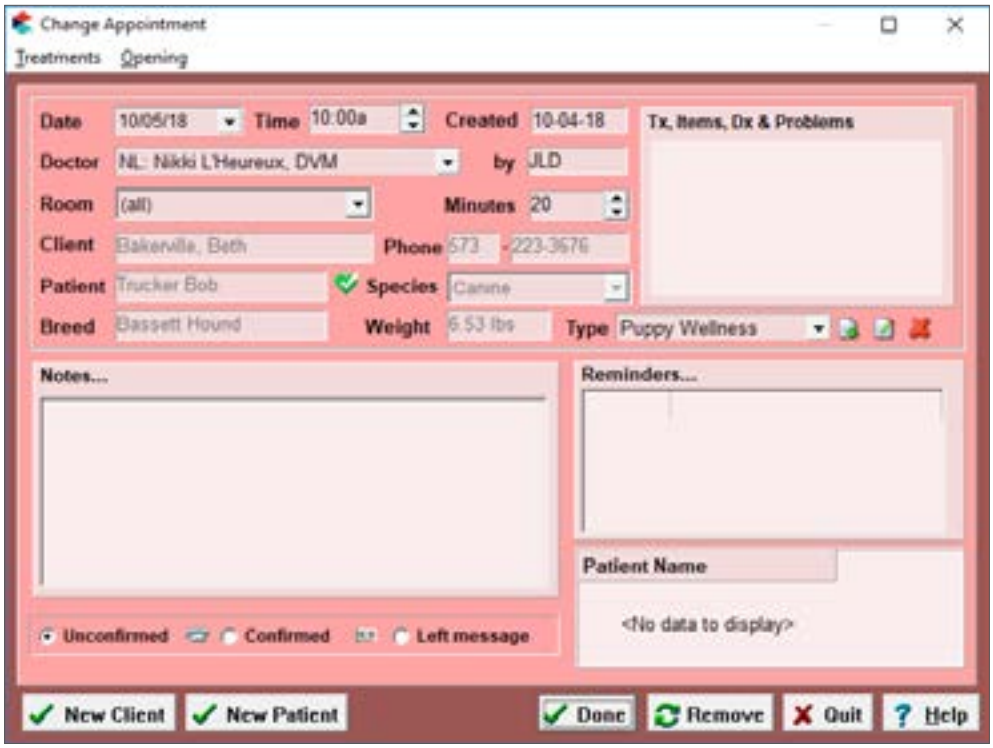
## Patient Tab Plan Indicator

## Whiteboard Plan Indicator




## Appointment Plan Indicator



## Plan indicator to Appointment Calendar Printout

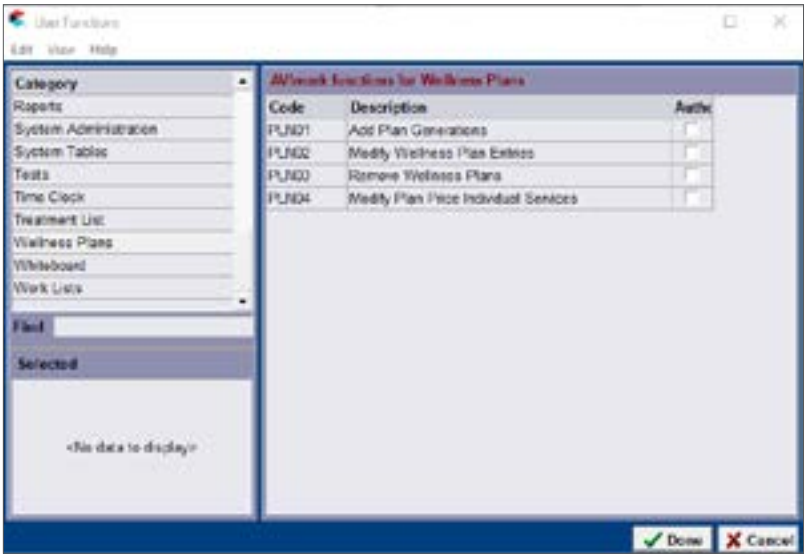
The Plan status will print on the Appointment Schedule as follows:

- **Yes** = Active
- **Y<30** = Expires within 30 days
- **Exp** = Expired

Doctor: Consolidated — APPOINTMENT SCHEDULE

| Time | | Room | Dr. | Client | Name | Phone No. | Plan | Patient | Species |
|---|---|---|---|---|---|---|---|---|---|
| 10:00a | 20 min. | | NL | 13 | Bakerville, Beth | (573) 223-3676 | Yes | Trucker Bob | CANINE |
| 10:20a | 20 min. | | NL | 13 | Bakerville, Beth | (573) 223-3676 | Y<30 | Tootsie Roll | CANINE |
| 10:40a | 20 min. | | NL | 13 | Bakerville, Beth | (573) 223-3676 | Exp | Trixie | CANINE |

# Wellness Plans Security Options




## Add Plan Generation

This option restricts users from adding Generations to Wellness Plan treatments. To enable this restriction the option will need to be secured to a user category. Once secured only the user logged in with permission to add a new generation will be allowed to click that option.

### Modify Wellness Plans Entries

This option restricts users from going into an open plan (new generation) and making any changes to the plan entries or the plan information. To enable this restriction the option will need to be secured to a user category. Once secured only the user logged in with permission to modify will have the ability to modify the Wellness Plan Entries.

### Remove Wellness Plans

This option restricts users from removing a Generation from an open plan without an admin password. To enable this restriction the option will need to be secured to a user category.

### Modify Plan Price Individual Services

This option restricts users from editing the Plan Amount on any treatment or item, the field will be greyed out and the user will have to login as a user with permission. To enable this restriction the option will need to be secured to a user category.

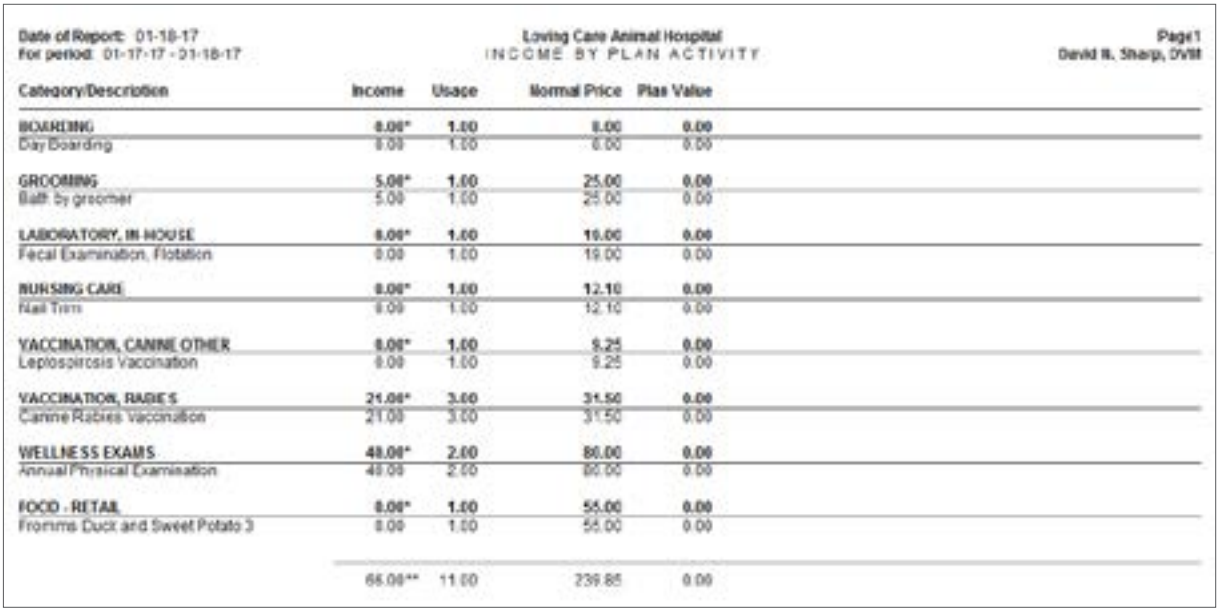
## Reports

There are Wellness Plans reports available for viewing the activities of Wellness Plans.

### Income by Plan Activity

This report will display production statistics for doctors who provide plan services and can be printed by Doctor or Consolidated.

1. Click on **Work with** > **Reports**.
2. Select the **Income by Plan Activity** report.
   - **Income** indicates what the price was for each service or item included in the Wellness Plan. In many cases, this will be zero.
   - **Usage** is the quantity within the time period selected that was used in conjunction with the Wellness Plan.
   - **Normal Price** is the normal charge for the service or item without a discount.
   - **Plan Value** is the Wellness Plan amount multiplied by the usage.



Date of Report: 01-18-17
For period: 01-17-17 - 01-18-17

Loving Care Animal Hospital
INCOME BY PLAN ACTIVITY

Page 1
David B. Sharp, DVM

| Category/Description | Income | Usage | Normal Price | Plan Value |
|---|---|---|---|---|
| BOARDING | 0.00* | 1.00 | 0.00 | 0.00 |
| Day Boarding | 0.00 | 1.00 | 0.00 | 0.00 |
| GROOMING | 5.00* | 1.00 | 25.00 | 0.00 |
| Bath by groomer | 5.00 | 1.00 | 25.00 | 0.00 |
| LABORATORY, IN HOUSE | 0.00* | 1.00 | 19.00 | 0.00 |
| Fecal Examination, Flotation | 0.00 | 1.00 | 19.00 | 0.00 |
| NURSING CARE | 0.00* | 1.00 | 12.10 | 0.00 |
| Nail Trim | 0.00 | 1.00 | 12.10 | 0.00 |
| VACCINATION, CANINE OTHER | 0.00* | 1.00 | 9.25 | 0.00 |
| Leptospirosis Vaccination | 0.00 | 1.00 | 9.25 | 0.00 |
| VACCINATION, RABIES | 21.00* | 3.00 | 31.50 | 0.00 |
| Canine Rabies Vaccination | 21.00 | 3.00 | 31.50 | 0.00 |
| WELLNESS EXAMS | 48.00* | 2.00 | 80.00 | 0.00 |
| Annual Physical Examination | 48.00 | 2.00 | 80.00 | 0.00 |
| FOOD - RETAIL | 0.00* | 1.00 | 55.00 | 0.00 |
| Fromms Duck and Sweet Potato 3 | 0.00 | 1.00 | 55.00 | 0.00 |
| | 66.00** | 11.00 | 239.85 | 0.00 |

## Wellness Plans Report

A detailed option is available with this report and will provide detailed information on patients currently on Plans.

1. Click on **Work with > Reports** then select the **Wellness Plan Report**.
2. Under the Income Options tab check the option of Detailed Wellness Plan.
3. When you print the report the original Wellness Plan Report will print along with an additional report that gives detailed information about patients currently on wellness plans.
4. If preview printing the Detailed Plan Report you will need to close the first report and then Avimark will display the detailed report.
5. This Detailed Wellness Plan report will list owners and patients currently on plans along with plan information such as Name, Expiration date, services and items fulfilled and those not remaining.

## Wellness Plans Report Advanced Option

The number of invoices generated off only wellness plan visits can now be included on the Period Totals report.

1. Open **Option Maintenance** by clicking on the speed bar button .
2. Search for *visit* and select the new option of **Wellness Plan Only Visit Count**.

3. Click on **Change** next to Default Value and set it to **True**.

Avimark will display the total number of Wellness Plan invoices and display that number as a separate line under the Total Invoices on the Period Totals Report.

**If a customer received non-plan entries during their visit, it will count as a standard invoice instead of counting as a plan-only visit.**

### Plan Usage Prompt

Avimark can display a prompt to verify "Plan usage will be calculated from mm/dd/yy." This is useful if a Wellness Plan had to be backdated; perhaps there wasn't access to the software or the client purchased an upgrade.

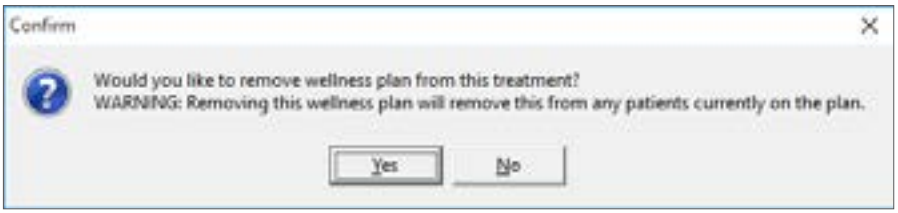
1. Open **Option Maintenance** by clicking on the speed bar button .
2. Search for *plan usage* and select the new option of **Plan Usage will be calculated from %s**.
3. Click on **Change** next to Default Value and set it to **OK**.

Avimark will calculate the wellness plan usage date automatically without needing verification.

# Removing a Wellness Plan from Treatments

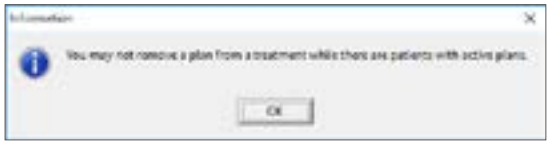
Wellness Plans are removed from a Treatment from the treatment's Plan Entries tab.

1. From the menu, click on **Work with > Treatment List**.
2. Select the treatment with the Wellness Plan to remove then click **Change** or double-click on the treatment.
3. Click on the **Plan Entries** tab.
4. Click the **Remove Plan** button. The following warning will appear:




5. Click **Yes** if you are sure you want to remove the plan.

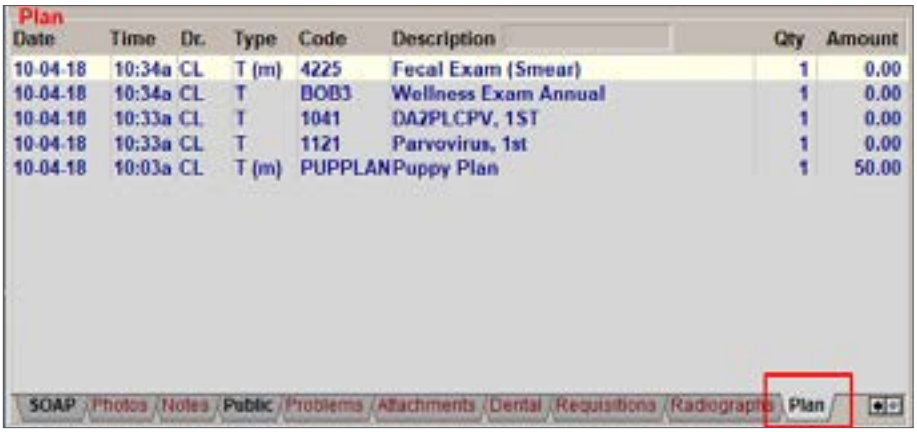
A different prompt will appear if the plan to be removed is still active on patients' accounts.

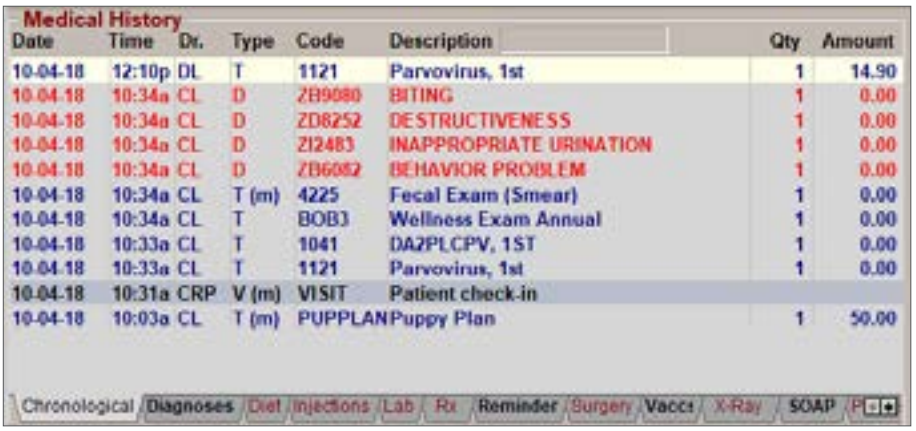



# Additional Enhancements

## Medical History Tab for Plans

The new Plan tab will display the wellness plan purchased and the included services the patient has purchased through the plan. In the images below, code 1121 was given with the plan and then again as a service. Once the plan quantity had been filled, it only shows once on the Plan tab.



## Client Friendly Print-out of Services Used and Remaining

This report can be printed from both the client area and the Patient Wellness Plan window.

**Health Plan Report**

Client: **Bakerville, Beth**
423 West Green Street
Piedmont IL 53557

Patient: **Tootsie Roll**
Canine Spayed Female

Plan: Puppy Plan (PUPPLAN)
Active: True
Expires: 11-02-18
Balance: 0.00

| Services UnPerformed | Quantity Remaining | Amount |
|---|---|---|
| Heartworm Test (Occult) | 1.00 | 19.10 |
| Rabies Canine, 1yr | 1.00 | 12.80 |
| Lyme Disease, 1st | 1.00 | 17.00 |
| Lyme Disease, 2nd | 1.00 | 17.00 |
| Parvovirus, 1st | 1.00 | 14.90 |
| Parvovirus, 2nd | 1.00 | 14.90 |
| Parvovirus Booster | 1.00 | 14.90 |
| Lyme Disease Booster | 1.00 | 0.00 |
| DA2PLCPV, 1ST | 1.00 | 28.00 |
| DA2PLCPV, 2ND | 1.00 | 28.00 |
| DA2PLCPV, 3RD | 1.00 | 28.00 |
| Corona, 1st | 1.00 | 14.90 |
| Corona, 2nd | 1.00 | 14.90 |
| Corona Booster | 1.00 | 14.90 |
| Bordetella, 1st | 1.00 | 13.80 |
| Bordetella, 2nd | 1.00 | 13.80 |
| Bordetella, Booster | 1.00 | 13.80 |
| Wellness Exam Annual | 1.00 | 0.00 |
| Fecal Exam (Smear) | 1.00 | 10.60 |
| Heartgard Plus 68 mcg | 12.00 | 15.00 |
| Advantage Dog <13lbs | 12.00 | 93.00 |
| Castration - Canine 21-50lbs | 1.00 | 61.50 |
| Ovariohysterectomy 21-50lbs | 1.00 | 75.50 |

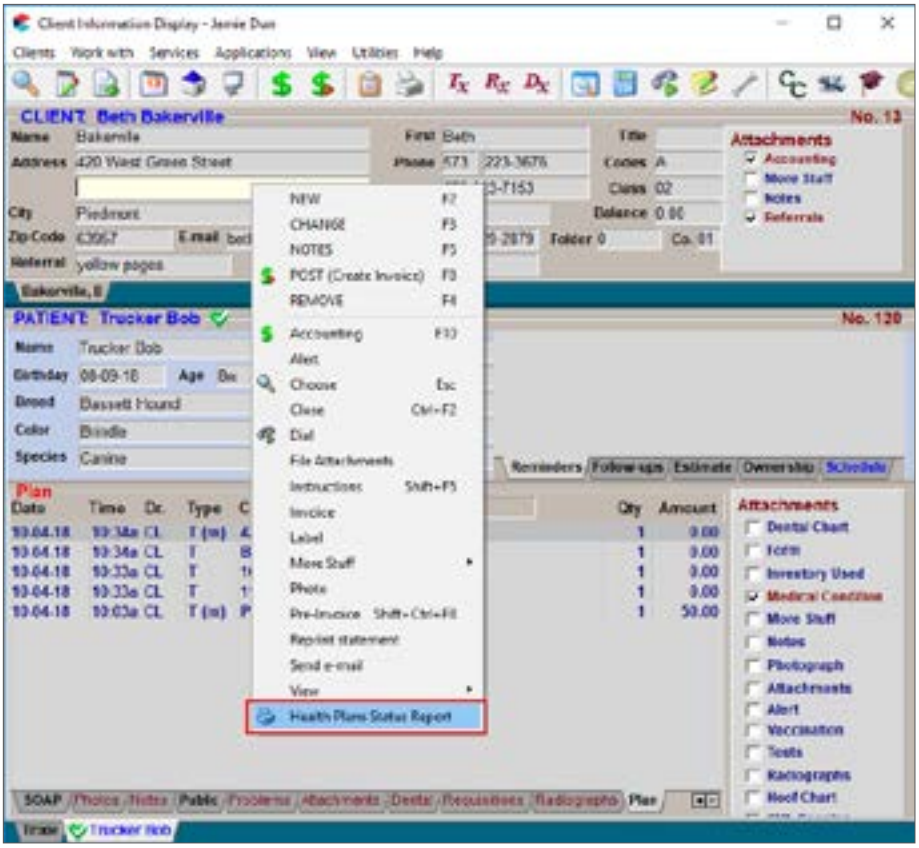
| Services Performed | Date | Quantity Performed | Amount |
|---|---|---|---|
| | | Total | 0.00 |

Patient: **Trecker Bob**
Canine Male

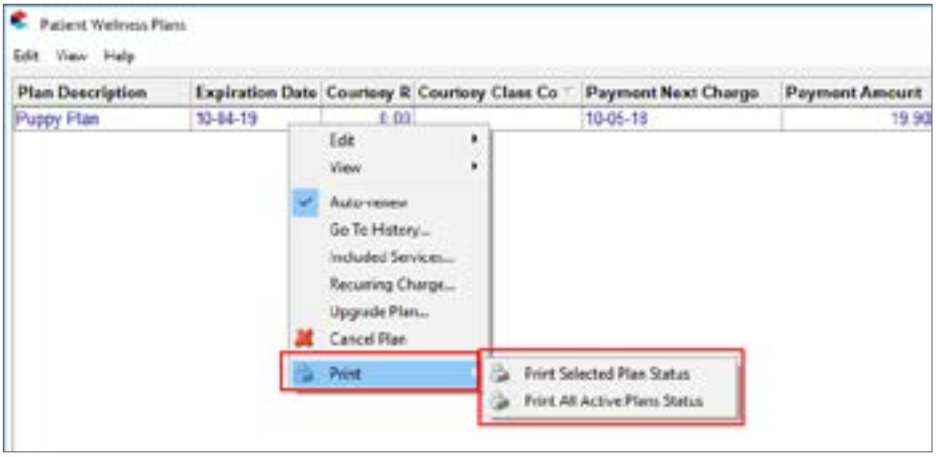
Plan: Puppy Plan (PUPPLAN)
Active: True
Expires: 10-04-19
Balance: 99.50

| Services UnPerformed | Quantity Remaining | Amount |
|---|---|---|
| Heartworm Test (Occult) | 1.00 | 19.10 |
| Rabies Canine, 1yr | 1.00 | 12.80 |
| Lyme Disease, 1st | 1.00 | 17.00 |
| Lyme Disease, 2nd | 1.00 | 17.00 |
| Parvovirus, 2nd | 1.00 | 14.90 |
| Parvovirus Booster | 1.00 | 14.90 |
| Lyme Disease Booster | 1.00 | 0.00 |
| DA2PLCPV, 2ND | 1.00 | 28.00 |
| DA2PLCPV, 3RD | 1.00 | 28.00 |
| Corona, 1st | 1.00 | 14.90 |

Client Area – Printing from the client area will list all patients on active Plans for that Client in one report.

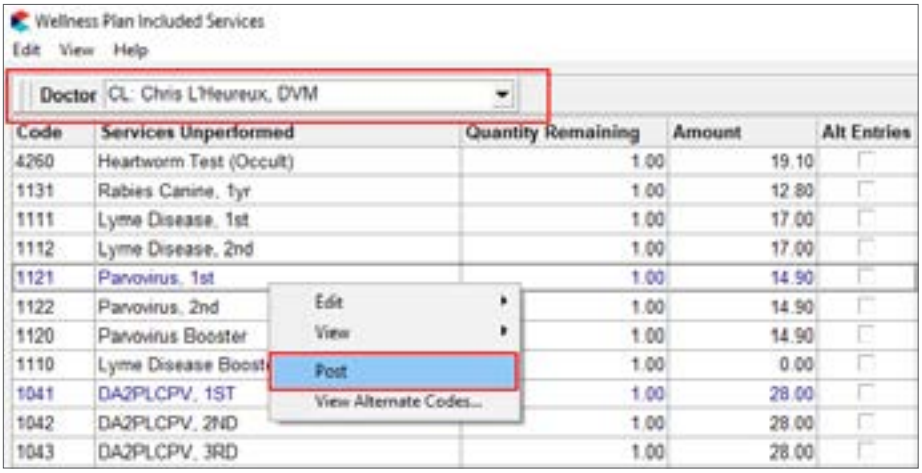


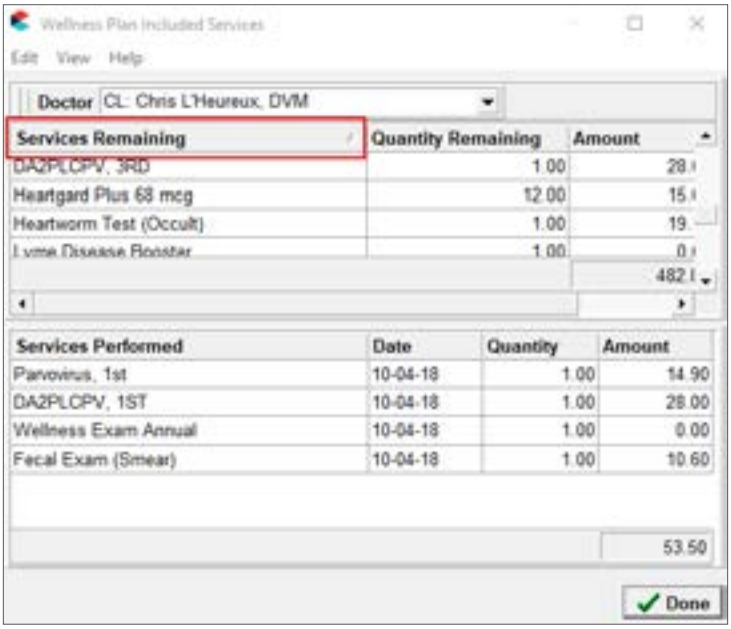

Patient Wellness Plans Window – Printing from this window allows you to print for just that patient and for just the Wellness Plan you have highlighted or print all active plans for the selected patient.



## Doctor Selection Combo-box

The doctor selected in the Doctor field will be the user who is placed in Medical History for entries highlighted before right-clicking and selecting Post.




## Included Services Heading

The heading “UnPerformed” has been changed to “Services Remaining”. This requires a default layout to make the name change due to Avimark did not want to undo the clinic’s columns without their consent.