



VCP Care Plans



AVIMARK®

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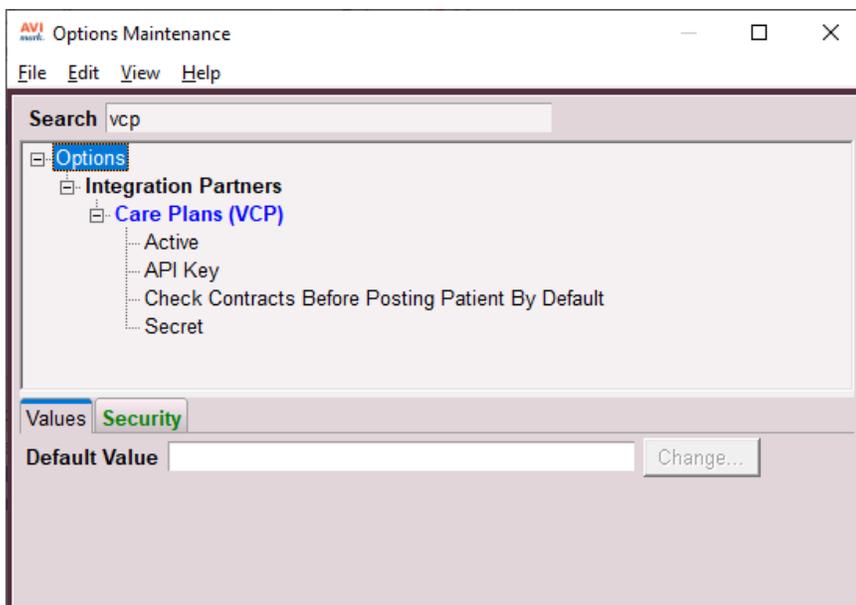
Overview

Avimark now has an integration with VCP, the leader in preventive care plans. This integration allows practices 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 Avimark software.

Setup

Before getting started, some setup is required in Avimark under Options Maintenance. This setup will be done by a VCP representative. Please call 800.315.1780 for assistance with the configuration.

1. In Avimark, click the Options Maintenance icon  on the speed bar.
2. In Options Maintenance, search for **vcp**.



3. Click on **Active** then click on **Change**. Set the value to **True**. Click **OK**.
4. Click on the **API Key**, click **Change** and enter in the Default Value. Click **OK**.
5. Click on **Secret**, click **Change** and enter the value. Click **OK**.
6. Click **Done** when finished to close Options Maintenance.

VCP Care Plans

The practice needs to work with a representative from VCP to setup care plans so the treatment items and their codes in the VCP care plan **match** the products and codes in Avimark. *Please note that the code for the VCP care plan must follow Avimark standards of up to eight alphanumeric characters.* For questions regarding the VCP enrollment process or setting up VCP care plans, contact a VCP representative at 800.315.1780. To go to VCP from within Avimark, click  on the speed bar.

Once the practice has their VCP care plans in place, the client will then be able to select a plan in VCP when they follow the link in the email or text message they receive when enrollment for a wellness care plan has been sent.

Send Enrollment to VCP

To enroll a client and the client's pet(s), follow the steps below to send an enrollment to the client through VCP.

1. In the client area **right-click > Care Plans > Send Enrollment**.

The Send Enrollment window opens pre-populated with the client email address and cell phone number from the Client area. This information can be changed in this window and the user can enable/disable the SMS (text message) notification option.



A number in the Phone field is required for enrollment but will not create an SMS with an enrollment link if SMS Notification is unchecked.

2. In the Send Enrollment window, select which active patients for the client should receive an enrollment in VCP. Following is a description of Contract meanings.

Patient	Contract
<input type="checkbox"/> Anya	Enrolled
<input type="checkbox"/> Eden Anne	Enrolled
<input checked="" type="checkbox"/> Rogan	No

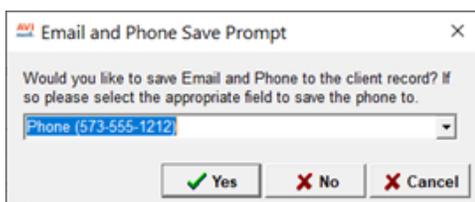
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Contract Meanings:

- ◇ **Enrolled** — An enrollment has been sent and approved. Another cannot be sent.
 - ◇ **No** — An enrollment link has not been sent to the client for the selected patient.
 - ◇ **Sent** — An enrollment link has been sent to the client for the selected patient but the client has not finalized the contract.
3. Click **Send**. This will send the client an email and/or text message with an enrollment link.
 4. Click **Cancel** to cancel the enrollment process and return to Avimark.

Modified Email or Phone

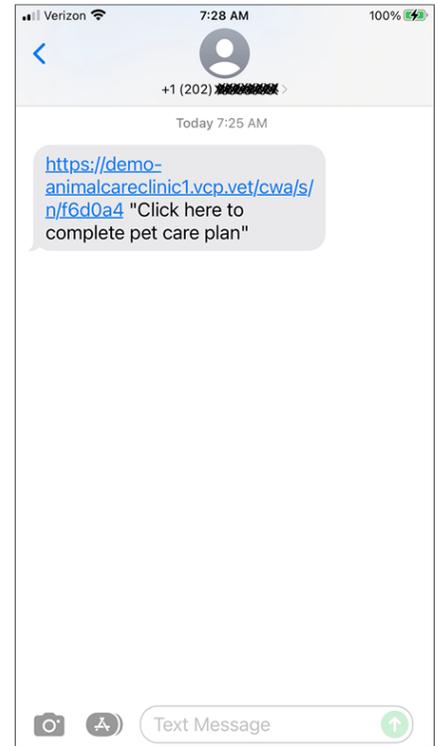
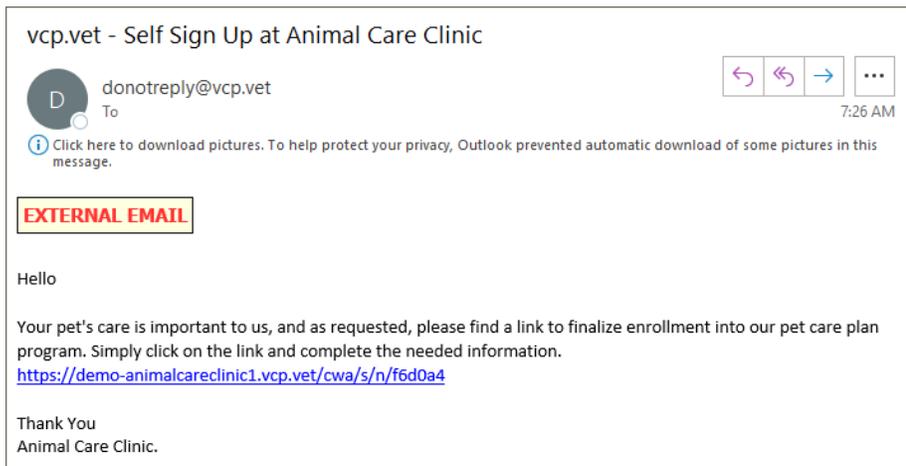
If the client email address or phone number is changed in the Send Enrollment dialog box to something other than what is in the client record in Avimark, the user will receive a prompt confirming if the change should be saved in the client record.



The email used to send enrollment must be the same email address for every enrollment sent for the client.

Enrollment Confirmation

After enrollment has been sent, the client receives an email or text message with a link for the client to click on and complete the enrollment process. The image below is an example of an email enrollment message and the image to the right is an enrollment text message.



The client clicks the link in the email or text message to complete the enrollment process to select a care plan and a payment plan.

Imported Care Plans

When the client completes the process of selecting a VCP care plan and payment has been approved, the plan will appear in the patient's record in Avimark. If Avimark does not show a VCP care plan, the user can update care plans using any of the methods below:

- In the client area, **right-click > Care Plans > Update Care Plans.**
- When the patient is **checked-in.**
- In the patient area, **right-click > Wellness Plans.**
- Post items in the patient's medical history to accounting.

PATIENT: **Eden Ann** ✔ ⊕ Updated at 5/18/2022 8:47:20 AM No. 1545

Name	Eden Anne	Codes		Sex	S	Added	05-18-22	815	Fecal Examination, Flotation	08-11-17
Birthdate	05-19-17	Age	5y	Rabies		Reminded	(none)	50002	Local Block	11-17-17
Breed	Newfoundland	Plan	AVIK9WP 05-17-23	Deceased	(none)			202	Annual Physical Examination	05-19-18
Color	White and Black	Weight	125.00	in	lbs	Microchip		406	Canine DA2PP Vaccination	05-19-18
Species	Canine	Allergy	(none)	Relation	(none)			408	Canine Rabies Vaccination	11-16-18

Reminders / Follow-ups / Estimate / Ownership / Schedule

Medical History

Date	Time	Dr.	Type	Code	Description	Qty	Amount	By	Photo	Public?	Attachments
05-18-22	8:25a	S		AVIK9WP	Canine Wellness Plan (VCP)	1	300.00	DNS		Yes	<input type="checkbox"/> Appointment(s) <input type="checkbox"/> Boarding <input type="checkbox"/> More Stuff

- 1. Plan Indicators** — The checkmarks indicate the patient has a wellness or care plan. The green heart check ✔ is an indication the patient has a plan (Avimark or VCP). The circled check ✔ represents a VCP care plan and will change color if the plan payment is current (**green**), close to expiring (**yellow**), or is late with payment (**red**). If the circled check shows payment is due or late (red), this gives the staff at the practice a “heads up” to bring it to the client’s attention.
- 2. Plan Name** — The name of the wellness or care plan will appear in the **Plan** field. If the patient has multiple plans, the word “**Multiple**” will appear. For more information, refer to page 15.

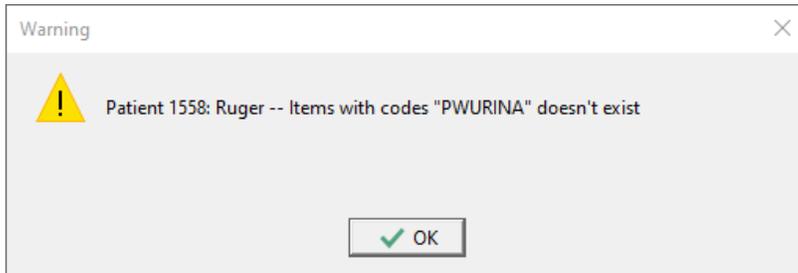


It is recommended a practice not run Avimark wellness plans and VCP care plans for the same client and patient.

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Import Warning Message

There can be a number of reasons a VCP care plan cannot import into Avimark. A warning will display with the reason the import failed.

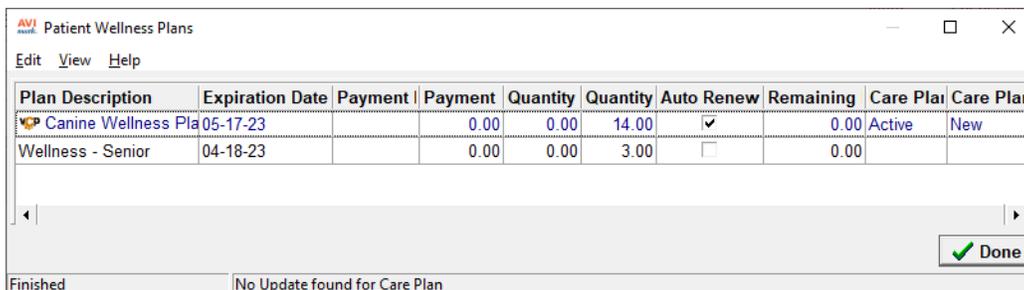


If the codes need to be changed in VCP to match Avimark, contact a VCP customer support representative for assistance.

Patient Wellness/Care Plans

To view a patient's wellness plans or VCP care plans:

1. In the Patient area, **right-click** > **Wellness Plans** to open Patient Wellness Plans. VCP care plans will have the VCP icon next to the Plan Description.



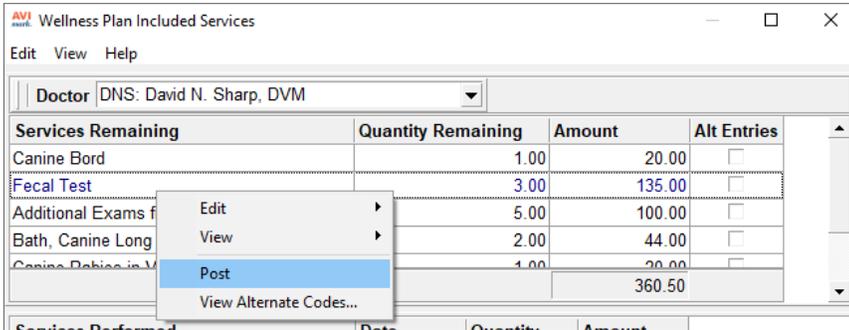
The screenshot shows a window titled "Patient Wellness Plans" with a menu bar (Edit, View, Help) and a table of care plans. The table has columns for Plan Description, Expiration Date, Payment, Quantity, Auto Renew, Remaining, Care Plan, and Care Plan. The first row is "Canine Wellness Pla" with an expiration date of 05-17-23, a payment of 0.00, a quantity of 14.00, and an auto-renew checkbox checked. The second row is "Wellness - Senior" with an expiration date of 04-18-23, a payment of 0.00, and a quantity of 3.00. A "Done" button with a green checkmark is at the bottom right. The status bar at the bottom says "Finished" and "No Update found for Care Plan".

Plan Description	Expiration Date	Payment	Payment	Quantity	Quantity	Auto Renew	Remaining	Care Plan	Care Plan
 Canine Wellness Pla	05-17-23		0.00	0.00	14.00	<input checked="" type="checkbox"/>	0.00	Active	New
Wellness - Senior	04-18-23		0.00	0.00	3.00	<input type="checkbox"/>	0.00		

2. From the window, click on a plan then **right-click** > **Included Services** to view the items in the plan.

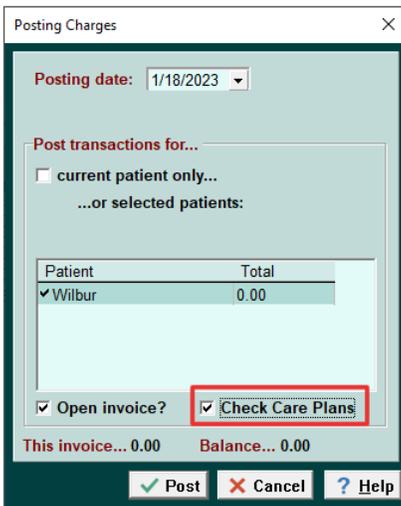
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- When viewing the services, **select the doctor** then **right-click** on a service and choose **Post** to apply the service to the patient's medical history.

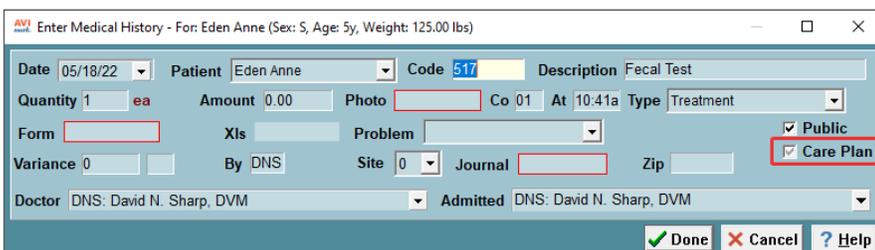


Posting Treatments

If items are posted to medical history then posted to accounting, there is an option to check if the items are part of the care plan.



If a treatment is added to medical history and is part of a VCP care plan, the **Care Plan** option will be checked but grayed out. It cannot be unchecked.



Accessing the Clinic's VCP Portal

You can access the clinic's VCP portal by clicking the VCP icon  on the speed bar in Avimark. If the active client and the active patient has a VCP care plan, the VCP portal will open to that client with the patient displayed. If the active client does not have a patient with a VCP care plan, VCP opens to the VCP Home Page.

Within the clinic's VCP portal, the practice can do the following and so much more:

- Edit client and patient information.
- Add a secondary care plan to a patient's record.
- Create care plans.
- Cancel a plan.
- Add a care plan to additional pets.

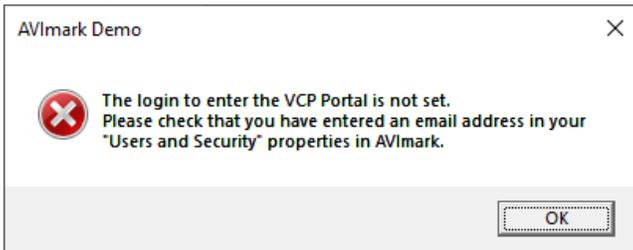


If adding an additional pet in VCP, the patient must exist in AVImark and the patient ID number must match to import the plan into that patient's record.

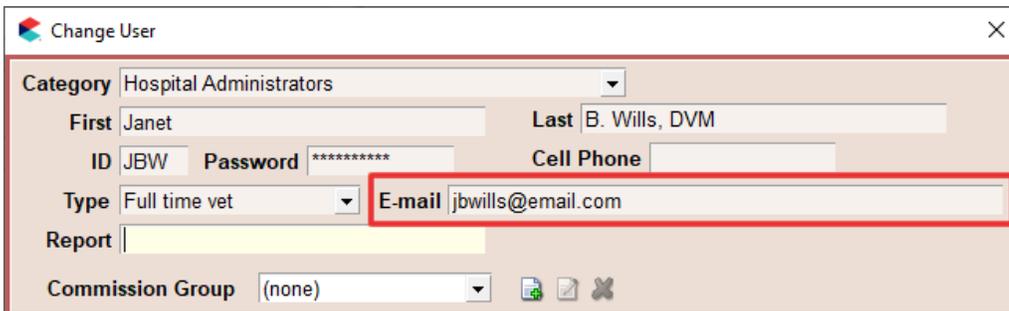
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User Email Validation

If the user's email in Avimark does not match the user's email in VCP, the following error will appear:



To resolve this error, in Avimark, go to **Work with > Users and Security**. On the user name, **right-click > Change**. Confirm the accuracy of the user's email address.



Next, contact VCP Support at 800.315.1780 ext. 1 to confirm the email address for the user matches the one in Avimark. If the email does not match, change the email in VCP to match the one in Avimark or vice versa.

Care Plan Right-click Options

Care plans may need to be updated if changes are made such as the client adds services to their current plan. Updating plans can be done from the client area shortcut menu or by changing the default setting under Options Maintenance.

Update Care Plans

The Avimark program has been designed to check for changes to VCP care plans.

Auto Updates

Open Options Maintenance () and search for VCP. Click on the option **Check Contracts Before Posting Patient By Default**. By default, this option is set to **True**. This means, before posting plan items to the invoice, the program will check for any changes to care plans. To turn this off, click **Change** and select **False** for the value.

Switching patients or checking a patient into the calendar will also auto check for plan updates but cannot be turned off.

Manual Updates

To manually run a plan update, in the client area, **right-click > Care Plans > Update Care Plans**.

Note: If there weren't any changes made to a plan from check-in to check-out, updating care plans is not necessary.

Manage Care Plans

This menu option will open the VCP clinic's portal. If the active client/patient has a VCP care plan, the portal will open to that client/patient record. If the active client/patient does not have a VCP care plan, the portal will open to the VCP home page.

Additional VCP Information

VCP IDs

- VCP will use the Avimark client/patient record number in the VCP clinic portal.
- A phone number and email address is required to send a request. The phone number does not have to be SMS.

Deducting Retroactive Services

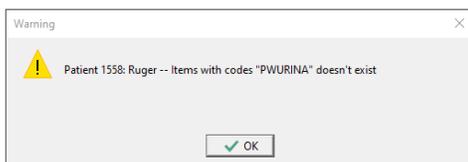
- When adding a plan to a patient's record and there are services and/or items already in the medical record that have been performed and the price zeroed out (must be posted to accounting), those items will be deducted from the services performed quantity.
- VCP care plans will technically become active at 12:01 am on the day approved. If a service has a price that won't be deducted, it may be because the item was posted to accounting before the day/time the care plan was approved.

Example: There are multiple items in medical history. One treatment and one inventory item have a zero charge. All other items have their charge unchanged. All items are posted to accounting.

When a VCP care plan is added the same day but after items were posted to accounting, the plan will go back to the time the plan was added that day (12:01 am) and will look at treatments and items that are part of the plan. The plan will only pull those items in as services performed if they only went in with a zero charge. If items were charged and paid in full, the plan will not take those paid items out of services performed from the plan.

Import Warning

- As mentioned on page 9, a warning will appear when the import fails. This warning can appear when the care plan is updated, the patient is checked-in, the service is posted to accounting, or a new service is added to medical history.



Multiple Plans

- Multiple plans can be imported into a patient record (primary and secondary) by adding an additional plan in VCP.
- Only clinics can add secondary plans to patients.
- The word “Multiple” will display in the Plan field of the patient record when there are multiple VCP care plans and/or Avimark wellness plans. However, as mentioned on page 7, it is recommended the practice does not use both VCP care plans and Avimark wellness plans.

Care Plan Discounts

- The Wellness Discount will always default to “best available”. Avimark will use the best available discount from the client, patient, and wellness plan. If the VCP care plan discount is not the greater discount, then Avimark will use the greater discount out of the three options.
- If a secondary plan is added or renewed, the Wellness Discount will remain as best available but can be changed to a specific wellness plan discount. However, if there was any other discount selection in this window when the secondary plan is imported, it will return the field to Best Available.
- Zero (0) action code excludes treatments or items from an automatic care plan discount. This includes when entering two items and only one remains on the plan. The first will go in as \$0.00 and the second as full price.

Optional Items

- Optional services will pull into Avimark from VCP as well as remove from Avimark included services when removed from the VCP care plan.

Plan Renewals

- A VCP care plan that was renewed will not show in Avimark until the previous plan expires.