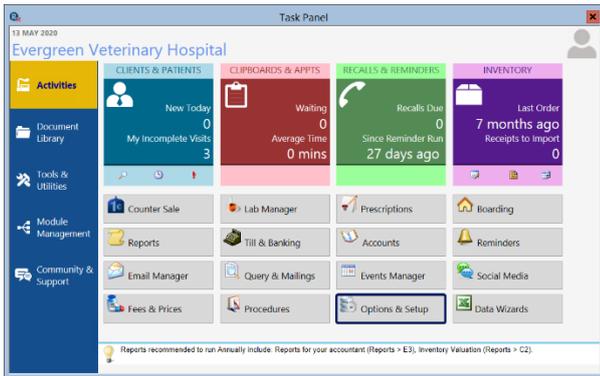


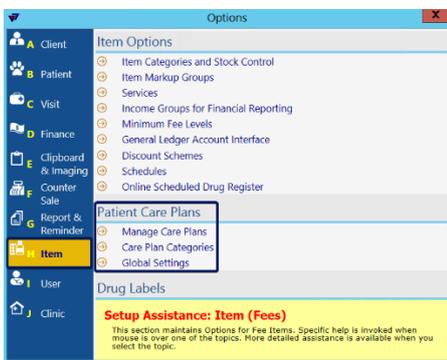
Back on Track – Recovering Lost Revenue & Care Plan Management

RxWorks





- Health Plans are a vital part of any Veterinary practice. Not only do they help Clients manage continuous care for their animals, but it creates a bond between Client and Practice. This helps to keep a steady base line of revenue coming in.
- From the **Task Panel** click **Options & Setup**.

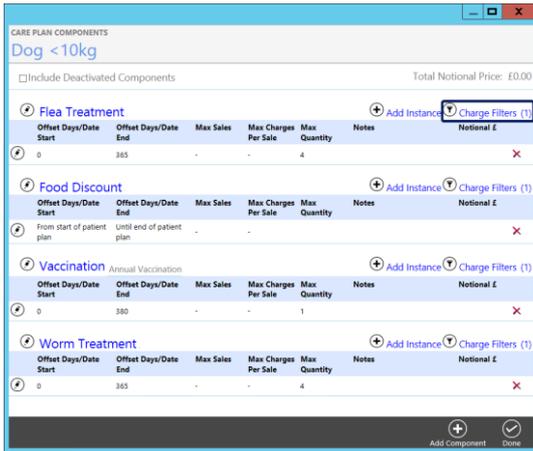


- Click **Item** then **Manage Care Plans**.

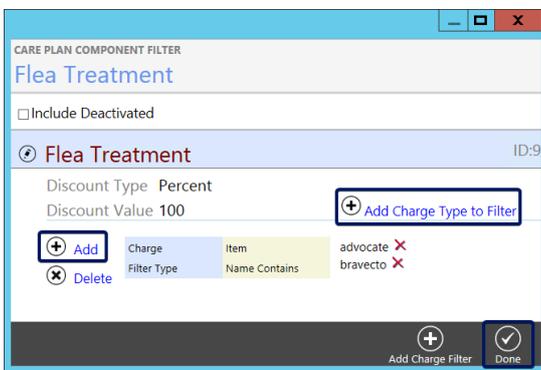
Name	Category	Rules	Status	Effective Dates	Initial Cost	Recurring Cost	Auto Renewal?
Dog <10kg	Healthy Pet Scheme		Active	29/05/2019 to 29/11/2029	£10.00	£10.00 per month	✓
Dog >10kg	TEST PLAN		Active	29/05/2019 to 29/11/2029	£10.00	£10.00 per month	✓
HPS - Small Dog <10kg	Healthy Pet Scheme		Active	From 01/08/2018	£10.00	£10.00 per month	✓
Healthy Pet Club Puppy	Healthy Pet club		Active	From 05/02/2020	£50.00	£10.00 per month	✓
Kitten Club	Healthy Pet Scheme		Active	21/02/2020 to 21/02/2021	£30.00	£30.00 per month	
LTM Diabetic	Long Term Med		Active	From 07/05/2020	£0.00	None	

- For each Care Plan, click on the **pencil icon** to open/edit the Care Plan.

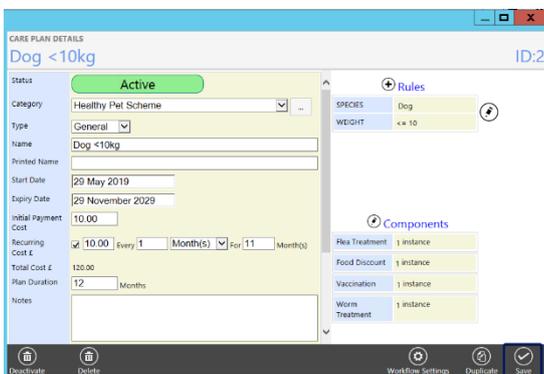
- Click **Components**.



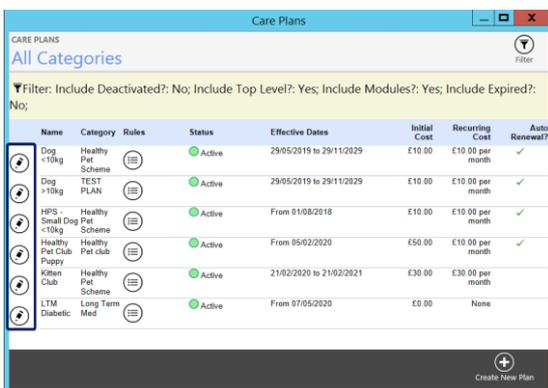
- The components displayed are all the individual elements that make up the Health Plan, i.e. Vaccinations, Flea and Wormers, Additional discount etc.
- Click **Charge Filters**.



- The **Charge Filter** will display the list of products and/or services that have been added to the health plan discount.
- If you need to add additional products or services, click **Add** next to the relevant charge filter criteria.
- Click **Done** when you have finished.

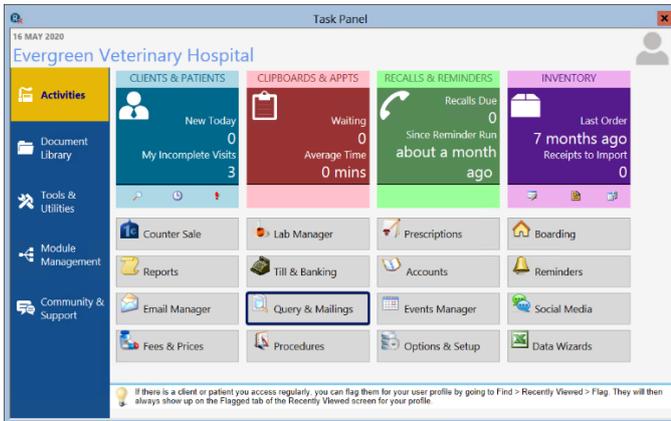


- Click **Save** after any changes have been made.

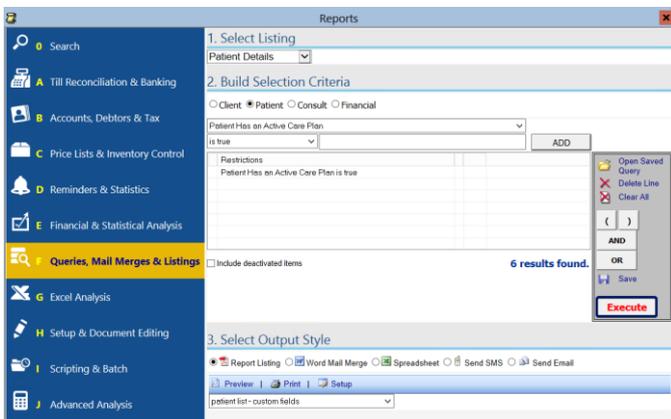


- Work through each of the Care Plans to ensure your most up to date products and services are included in the setup.

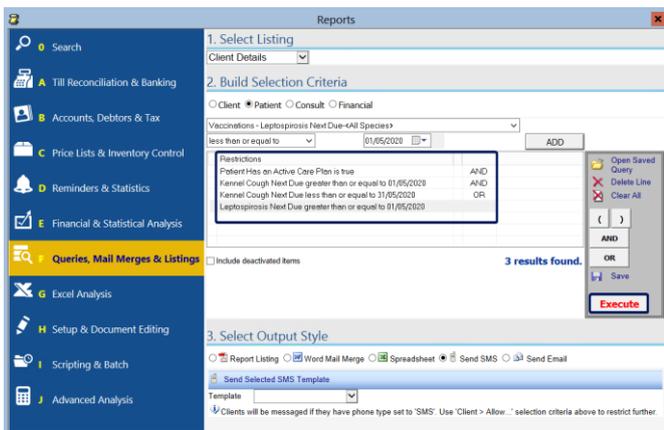
How to Report on Care Plans



- From the **Task Panel** click **Query & Mailings**.

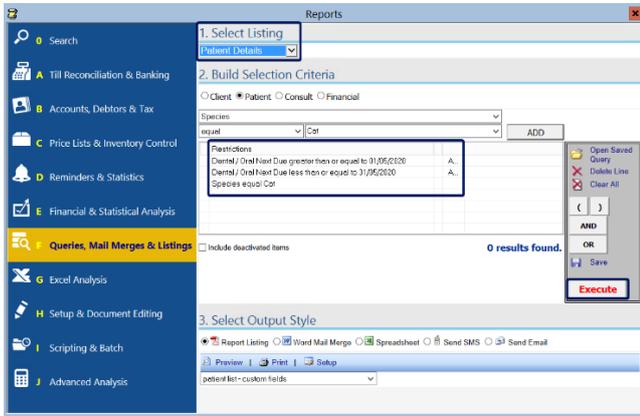


- Using **Queries, Mail Merges & Listings**, you can create a query to bring a list of all Patients that are on a Care Plan.
- In this example, I have asked the system to show all Patients that have an Active Care Plan, but you have the option to include Pending Care Plan too if you have any.
- Click **Execute** once you have added in all the criteria you need.
- Select the output method you would like such as PDF / Excel or to send an SMS or Email.

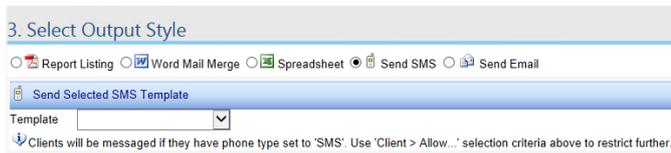


- You can use the query builder to make the query as basic or as complex as you would like. The more layers you add to the query, you will start to see the use of **AND** or **OR** appearing.
- Remember to click **Execute** if you add a new line to the query to refresh your results.

How to use Recalls & Reminders via Queries

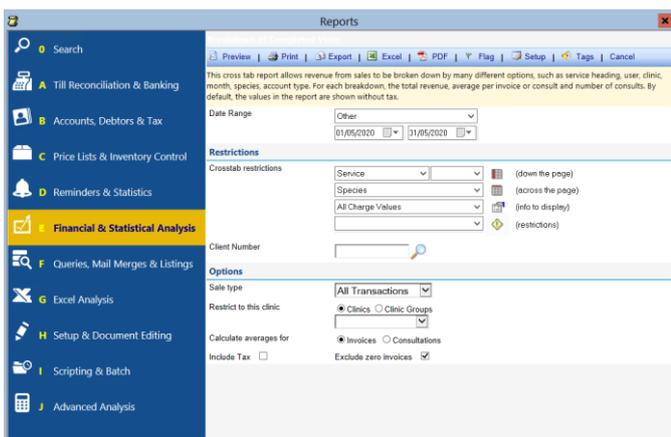


- If you use **Recalls**, you can use the query builder to search for these too.



- You can use the query builder to contact your Clients using a variety of methods:
- Excel Spreadsheet** – to upload to a third party to send out communications.
- Word Mail Merge** – to generate a document to post to all your Clients.
- Send SMS or Email** – to communicate directly from RxWorks to your Clients.

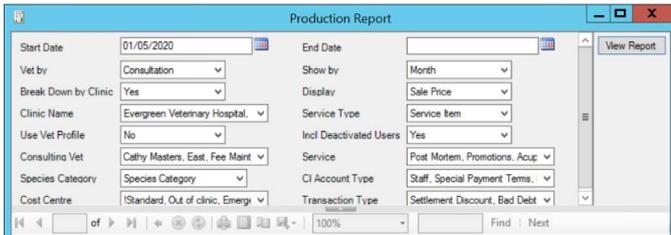
How to Run Revenue Reports



- The **E3** report can be used to generate sales from certain time periods, i.e. compare last year to this year.
- You can view the results in either PDF or Excel depending on how you would like to process the information.



- From **Reports, Advanced Analysis**, click **Production Report**. (Requires Level 9 Reports Security)



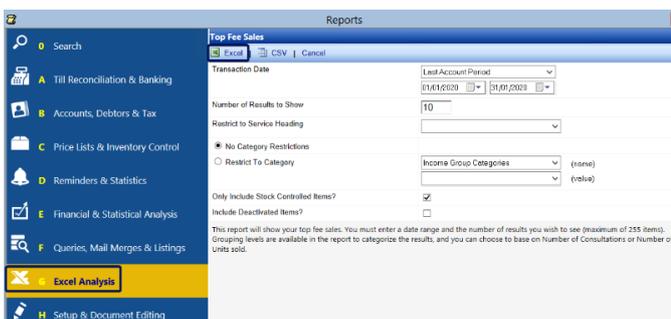
- It allows you to enter in various criteria such as specific staff / service headings / transaction types / date range etc.
- You can have multiple versions of the report open at any one time so if you would like to have one comparing 2019 to 2020 for instance, just click on **Production Report** twice for it to load two windows.

Service	Total	Feb-2020		Mar-2020	
		Units	Net of Tax	Units	Net of Tax
Total	135.00	2,543.31	10.00	170.05	53.00
Anaesthesia	20.00	771.32	0.00	0.00	20.00
Anaesthesia Induction	4.00	253.23	0.00	0.00	4.00
Anaesthesia Maintenance Per 15 Mins	12.00	488.45	0.00	0.00	12.00
Pre Anaesthetic Evaluation	4.00	29.64	0.00	0.00	4.00
Consultation	3.00	147.68	2.00	98.45	0.00
Consumables	21.00	9.29	0.00	0.00	0.00
Discount	9.00	-227.88	2.00	-92.16	3.00
Flea, Worm & Tick Preparations	5.00	218.55	2.00	92.46	0.00
Foods, Nutrition & Supplements	3.00	226.77	1.00	56.41	1.00
Hospital & Nursing Care	4.00	116.77	0.00	0.00	4.00
Inventory Packs	8.00	93.87	0.00	0.00	8.00

- Here is an example of how the data would look.
- You can use the + symbol to expand individual service headings / staff / species etc. depending on your criteria.



- From **Reports, Excel Analysis**, scroll down to **Products and Services** and click on **Top Fee Sales**.



- This report will show you your top sales products and services from the time criteria you set.
- This can help show you what generated most revenue in that given period.