

Plans comparison		Basic	Lite	Pro
	Complimentary iOS App	✓	✓	✓
	Free Customer Services support	✓	✓	✓
	Access to free online 1-2-1 training	✓	✓	✓
	Secure Messaging and healthDrive		✓	✓
	UK – GDPR Toolkit		✓	✓
	No charge for additional users		✓	✓
Patient management	Patient database & duplicate patient checker	✓	✓	✓
	Contact book	✓	✓	✓
	Insurance membership look-up (if available)		✓	✓
	Notes and alerts			✓
Invoicing	Paper invoices	✓	✓	✓
	Electronic invoices to insurers (with validation)	✓	✓	✓
	Electronic invoices to patients via patientzone	✓	✓	✓
	Built-in diagnosis and procedure code look-up	✓	✓	✓
	Pre-populated invoices from hospital feed		✓	✓
	Patient account statement		✓	✓
	Invoice tasks			✓
Appointments	Diary and easy clinic session setup	✓	✓	✓
	Add unavailability and sessions for admin/regular meetings	✓	✓	✓
	Video consultations		✓	✓
	Confirmations with patient instructions and reminders – text or email		✓	✓
	Prompt to re-schedule a cancelled appointment or add to waiting list		✓	✓
	Appointment lists – by appointment type, practitioner, status			✓
Accounting	Pricing lists (practitioner fee calculation)	✓	✓	✓
	View and print insurer remittances	✓	✓	✓
	Payment tracking – record payments received		✓	✓
	Bulk payments & auto-allocation		✓	✓
	Auto record payments via patientzone		✓	✓
	Debt reallocation to another payor		✓	✓
	Credit control			✓
Reporting	Invoice and payment data export	✓	✓	✓
	Financial snapshot		✓	✓
	Invoicing lists – by date, patient and payor		✓	✓
	Payment lists – summary, date, patient and payor, refund/overpayments, unassigned credit		✓	✓
	Reconciliation – by patient		✓	✓
	Debtors – outstanding invoices by payor		✓	✓
	Account analysis – basic		✓	✓
	Aged debt analysis			✓
	Banking – end of day and month			✓
	Reconciliation			✓
	Summary accounting reports – full or by patient, payor and payor type			✓
Correspondence	Payment reminder & shortfall letters		✓	✓
	Custom letters			✓
	Word processing			✓
	Text messaging			✓
	Draft/print letter queues			✓