

Submitting a Claim

Step 1: Create and **Permanently Save** the invoice in **IntraVet**. The invoice will now be available in Trupanion's software.

Patient	Code	Description	Dr	Date	Qty	Price	Amount
RYDER	PHYSI	PHYSICAL EXAMINATION	TE	12/20/2016			
RYDER	EARF1	Ear Flush Level 1	TE	12/20/2016	1.00		
RYDER	LI400	Cytology / Ears	TE	12/20/2016	1.00	54.80	54.80
RYDER	OT670	Otomax 15 gr	TE	12/20/2016	1.00	30.74	30.74
RYDER	OTITE	OTITIS EXTERNA	TE	12/20/2016			

Step 2: From the **Appointments** page in **Trupanion's software**, click the blue **Start Claim** button on the pet file.

Step 3: Confirm **Finalized Invoice** is selected.

Step 4a: If the claim is due to an accident, select **Yes**. If not, or if you are unsure, select **No/Not Sure**. Enter the *Reason for treatment* and *Date of first sign*. Click **Enter additional notes/comments** to add more detail about the pet's visit. Adding more detail can help expedite claims processing.

Step 4b: If a claim has previously been filed for the condition, click **Yes** and you will have the ability to select the related claim. This will pre-fill the *Reason for treatment* and *Date of first sign*. Add additional details if desired. This option won't be available if the pet hasn't had any prior claims with you.

Step 5: Confirm the correct invoice and Attending DVM are selected, or select the correct information from the drop-downs lists. The most recent invoice will be selected by default.

Date	Pet	Description	Qty	Price
11/18/2014	Alfalfa	Physical Exam	1	\$51.50
11/18/2014	Alfalfa	Ear Cytology - In House	1	\$39.06

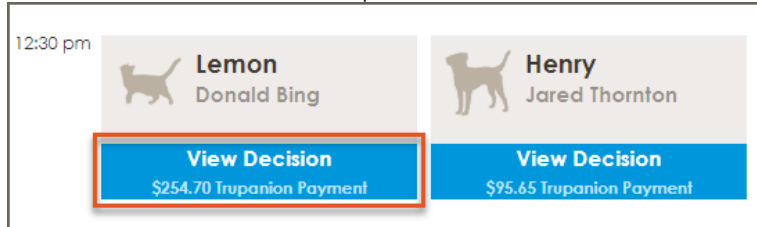
Step 6: Confirm the payment as **Pay to Hospital** or select **Pay to Client**. **Pay to Hospital** should be used to provide the best client experience.

Step 7: Type your name in *Submitter's Name* and click **Submit Claim**.

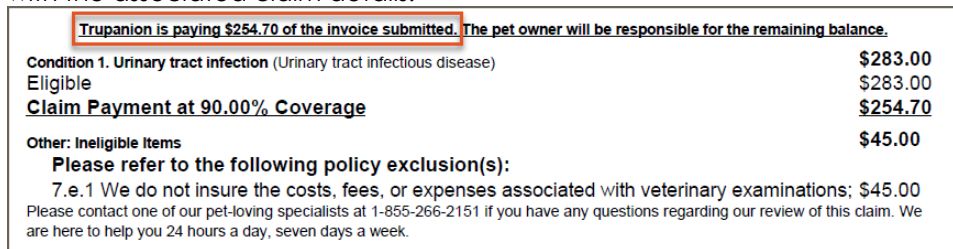
Claims Tip: Claims can also be started by clicking **Start New Claim** from the Main Menu.

Viewing the Decision Letter and Adding Payment

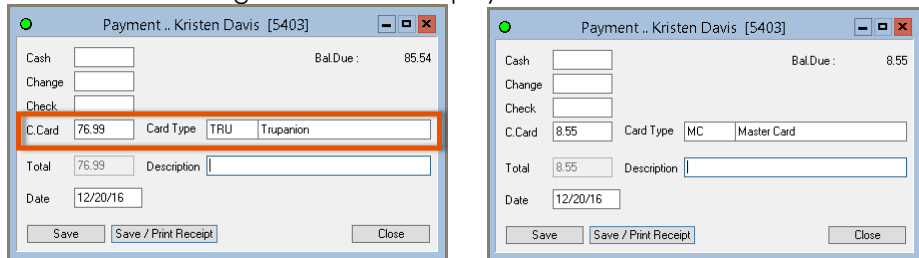
Step 1: From the **Appointments** page in *Trupanion's software*, select the blue **View Decision** button on the pet's tile.



Step 2: The decision letter will show the amount Trupanion is paying along with the associated claim details.



Step 3: In *IntraVet*, access the payment screen for the client. In the C. Card filed, enter the amount from the decision letter and select the Trupanion payment type. Add another payment, enter the client's payment type, and enter the remaining balance as the payment amount.

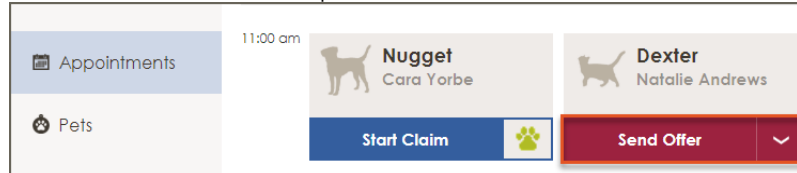


Have a Question? Need Help?

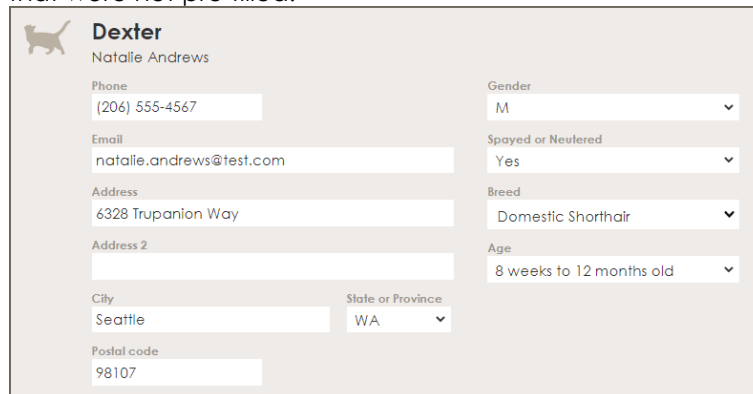
The Vet Support team is available to answer questions, resolve issues, and help you get the most out of Trupanion's software. Feel free to call us at **888.733.2670**, or email us at **vetsupport@trupanion.com**.

Issuing an Exam Day Offer

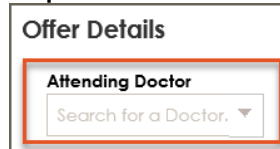
Step 1: From the **Appointments** page in *Trupanion's software*, click the red **Send Offer** button on the pet tile.



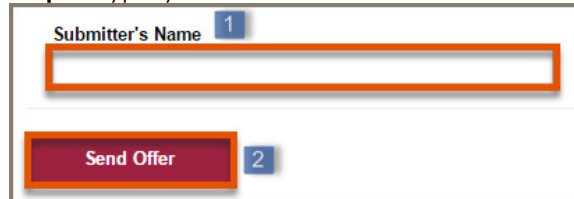
Step 2: Confirm the client and patient information and complete any fields that were not pre-filled.



Step 3: Select the *Attending DVM* from the drop-down list.



Step 4: Type your name in *Submitter's Name* and click **Send Offer**.



The pet owner receives the Exam Day Offer notification and will have 24 hours to activate their pet's offer. Encourage them to activate the offer while they are still in the hospital.