tr⊌panion

Submitting a Claim

Step 1: Create and **Post** the invoice in **VIA**. The invoice will now be available in Trupanion's software.

Patient	Dem	Description	Qty	UOM	Price	Amount
Muffin	Pe	Physical Exam / consultation	1		45.00	45.00
Muttin	EarStain	Ear Stain	1		24.00	24.00
Muttin	EarClean	Clean ears	1		16.00	16.00
Muffin	Epi04	Epi olic ear cleanier 4 oz	1		7.58	7.38
Muffin	Disp Fee Pre	Dispension Print / Post Visit for Fields, Krissy - 5/28/15	1		4.00	4.00
		The yisk generated these transactions and documents. Select the ones you wish to print or post.				
		Select Description Template Copies Last Print Last 9				
		Sinvoice #10973 (Posted) Invoice 1				
		Rx Label - Epi otio ear cleanse Rx Lbl Tu-10 Refill 1				
		Conter Pagment.				
		East Selected				
		Pgot Dem				
		Previeg Dem				
		Clear All				
		There are no pending transactions associated with this visit. Seject				
		Best Court				
		Invoice 10973:				
		Subtetal: 96.38				
)_toils	Settings [information	Discount: 0.00 Kun Bai: 2,055.47 Peeds, Krssy Tav: 0.00 Invit Bai: 0.00 No.				
iden 09	 11:50 AM 5/28/15 	Total: 26.30 Total: Postad Credit limit: N/A			T	u <u>k</u>
rnal	, , , , , , , , , , , , , , , , , , ,				× Pr	ompţ
					R	sal
ernal					× v	spoine
						Latel
ument:	Entere	d: SA - Divint Line - Tamble Discount				boratory
code:				Item Searc	h [1	nage Stud <u>x</u>
Naffin	 10158, Yorkie, S, 7 years 	5 months old, Brown/Black				
					те	tal: 96.38

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



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.



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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.

Filed a claim for this co	ondition before?		
✓ Yes	No 1		
Choose a related claim	2		Choose different claim
Limping Claim# 1008588	Claim Date 11/20/2014	Claim Type Final Invoice	
Reason for treatment		Date of first sign	
Limping		10/30/2014	
Enter additional notes/comme	ents	Ŭ	

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.

Invoice for Claim 48770 Line Items for inv	Atter	nding DVM viller, DVM v		
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.

Pa	iymer	nt and Authorization	
	~	Pay to Hospital	Pay to Client

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

the Main Mer	aims can also be started by clicking Start New Claim from nu.
Start New Claim	

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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.

	Trupanion is paying \$254.70 of the invoice submitted. The pet owner will be responsible for the remaining	g balance.
Condit	ion 1. Urinary tract infection (Urinary tract infectious disease)	\$283.00
Eligib	le	\$283.00
Clain	n Payment at 90.00% Coverage	<u>\$254.70</u>
Other:	Ineligible Items	\$45.00
PI	ease refer to the following policy exclusion(s):	
7.e Please are her	e.1 We do not insure the costs, fees, or expenses associated with veterinary examinat contact one of our pet-loving specialists at 1-855-266-2151 if you have any questions regarding our review of e to help you 24 hours a day, seven days a week.	ions; \$45.00 of this claim. We

Step 3: On the payment screen in **VIA**, select the Trupanion payment type and enter the amount from the decision letter. Add an **Other Payment** from the Print/Post window. Select the client's payment type and enter the remaining balance as the payment amount.



C)erk:							<u>o</u> x
Fields	i, Krissy		٩				OK & New
Payme	nt method:	Check	number: D	ate:	Pa	ment arooutt:	⊆ancel
Vice		•		6/1/15 4:41 PI	4 •	44.20	Clear Applied
Memor		_					Client Search
							Delete
Entere	d by:						grevious
SA	-					Process	Next
							Resister
Runnin	g balance:	0.00		Client type			Frint
Total b	alance:	44.38		Homes	(206)	995-1115	Halp
Credit	ink:			Phone 2:			Deb.
Total t	a apply:	44.35		Unapplied	amt.: 0.00		019855
outer	arian Invrices	/ Formert Chu	roas:		AU00 -	Apply Payment	30.0
	Date	Type	Number	Orig. Arre.	Arrit, Due	Payment	
Pay							

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.

Appointments	11:00 am	Nugget Cara Yorbe		Dexter Natalie Andrew	VS
🙁 Pets		Start Claim	*	Send Offer	~

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

K	Dexter Natalie Andrews						
	Phone				Gender		
	(206) 555-4567				М	~	
	Email				Spayed or Neutered		
	natalie.andrews@test.cor	m			Yes	~	
	Address				Breed		
	6328 Trupanion Way				Domestic Shorthair	~	
	Address 2				Age		
					8 weeks to 12 months old	~	
	City		State or Pro	vince			
	Seattle		WA	~			
	Postal code						
	98107						

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



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

Submitter's Name 1
Sud Office III
Send Otter 2

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.

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