

ImproMed

User Guide

trupanion™

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Software System Requirements

For optimum performance of Trupanion's software, verify that your system meets or exceeds the recommended specifications below. These recommendations are the minimum required to ensure that the software operates efficiently without impact to other applications in your hospital. More resources may be necessary depending on the software and services installed on your system. Contact your IT consultant for further guidance.

Network Requirements

An active, high speed internet connection with a supported browser (see below) is required.

Practice Management System Compatibility

Trupanion's software is compatible with the following practice management systems:

- AVImark
- Cornerstone
- ImproMed
- IntraVet
- Vetspire
- Vetter
- VIA
- WOOFware

Multi-site or shared database functionality is generally supported, however, each practice management system varies in how it records location per data type and may not allow for data filtering within Trupanion's software.

Browser Compatibility

Trupanion's software can be accessed from any of your workstations or devices using one of the following browsers:

- Google Chrome (Recommended)
- Internet Explorer 10 (or newer)

Server Operating System Compatibility (Install only)

For practice management systems that require an installation, the installation must be completed on the database server. The server must be Windows based and running one of the following operating systems:

- Windows Server 2016
- Windows Server 2012 or 2012 R2
- Windows 10
- Windows 8/8.1

Server Hardware Compatibility (Install only)

For practice management systems that require an installation, the following hardware minimums are required:

- Processor: Intel Core or higher
- Memory: 8 GB
- Minimum Disk Space: x86 – 500 MB; x64 – 1 GB

Microsoft .NET Framework (Install only)

- .NET 4.5 or higher

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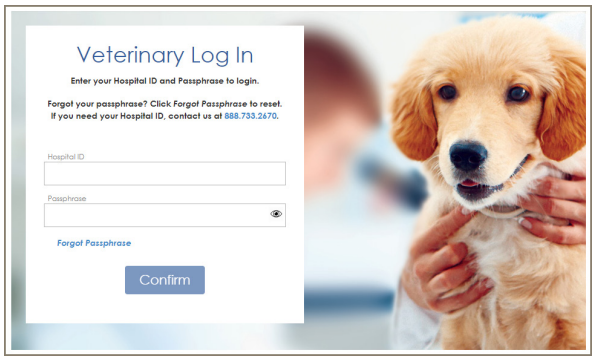
Workstation Access

Trupanion's software is web-based, making it very easy to access from any workstation in your hospital.

Logging In

Logging in is quick and easy. The only information you will need is your Hospital ID and Passphrase.

1. Open your browser and enter the web address of the software: **express.trupanion.com**.

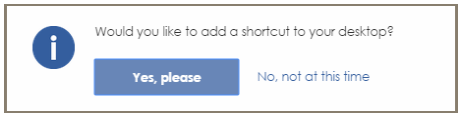


2. Enter the Hospital ID provided to you by Trupanion and the Passphrase you set during the onboarding process. Click **Confirm.**

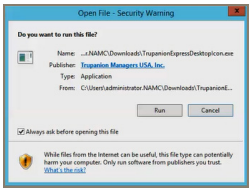
Desktop Shortcut

For ease of access, we recommend that you add a desktop shortcut on each workstation.

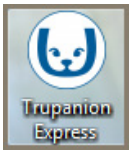
1. You will be presented with the option to add a desktop shortcut once you have clicked **Confirm** from the login screen.



2. Click **Yes, please**. Once the desktop shortcut application has downloaded, click to install it. You may be presented with a File Security Warning. Click **Open** or **Run**.



3. You will receive a message that the icon was successfully added. Click **OK** to close the message. You will now be able to access Trupanion's software using either the desktop shortcut or the software web address.



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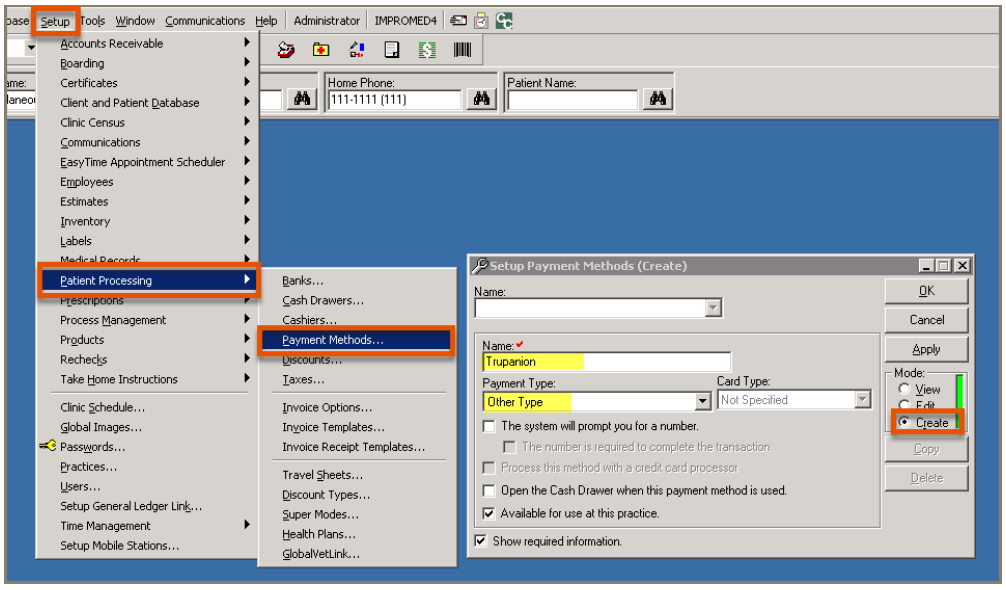
Adding the Trupanion Payment Type to ImproMed

Since Trupanion can pay your hospital directly for claims filed through the software, you will need to add a "Trupanion" payment type in your practice management system. This is generally a simple configuration, however, an Administrator login may be required.

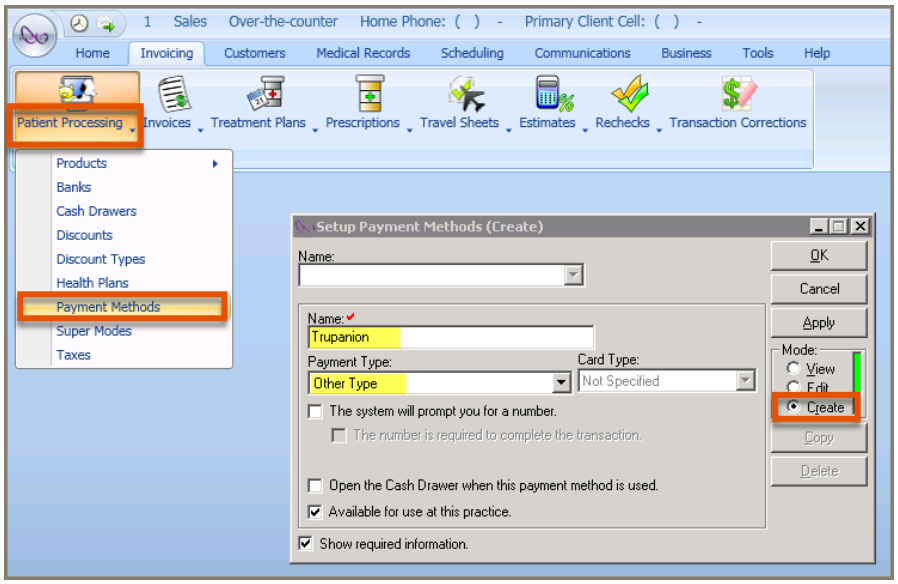
1. In ***ImproMed 4.X***, go to Setup | Patient Processing | Payment Methods. In ***ImproMed 5.X***, go to Invoicing | Patient Processing | Payment Methods.

2. Select the **Create** radio button and add the Trupanion payment type details.
    a. Name = Trupanion
    b. Payment Type = Other Type

3. Click **Apply** and **OK**



ImproMed 4.X



ImproMed 5.X

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Behind the Scenes

The integration of Trupanion's software with your practice management system allows the software to pre-populate your client and patient information, link pets with existing Trupanion policies, show the list of pets with appointments for the day, and allows access to estimate and invoice information for claims and pre-approval processes.

Refresh Intervals

Most of the data is refreshed immediately, however, some data is refreshed on an interval basis to ensure there is no impact to the performance of your practice management system.

1. **Appointments** – This information comes from your practice management system and is refreshed every 5 minutes. You will need to refresh the page in order to see the changes.

2. **Claims** – This information comes from Trupanion and is refreshed immediately as the claims are updated in Trupanion's system.

3. **Policy Information** – This information comes from Trupanion and is refreshed immediately as information is updated in Trupanion's system.

4. **Dashboard and Reports** – This information comes from Trupanion and is refreshed immediately as information is updated in Trupanion's system.

Estimates

In order for Trupanion's software to access an estimate for purposes of a pre-approval, you must have a **saved** estimate available for the pet.

Invoices

In order for Trupanion's software to access an invoice for purposes of a claim or pre-approval, you must have a **closed/finalized/concluded/posted** invoice available for the pet. Only finalized invoices should be used for claims submission.

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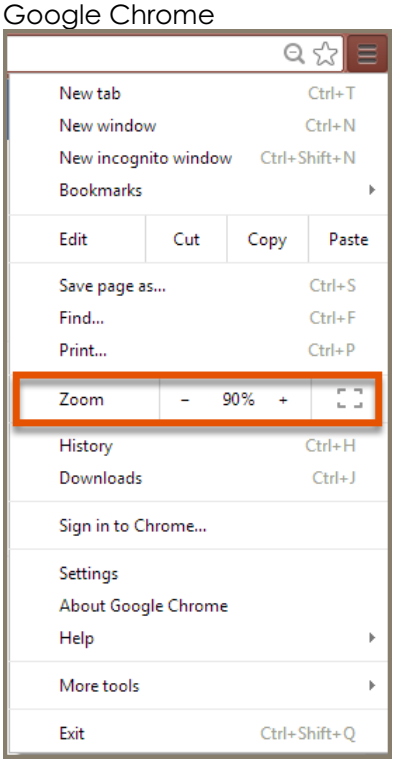
Software Overview

We worked hard to ensure that the software is intuitive, the workflow is seamless with minimal steps to complete a task, and the user is not limited to a particular device or screen resolution.

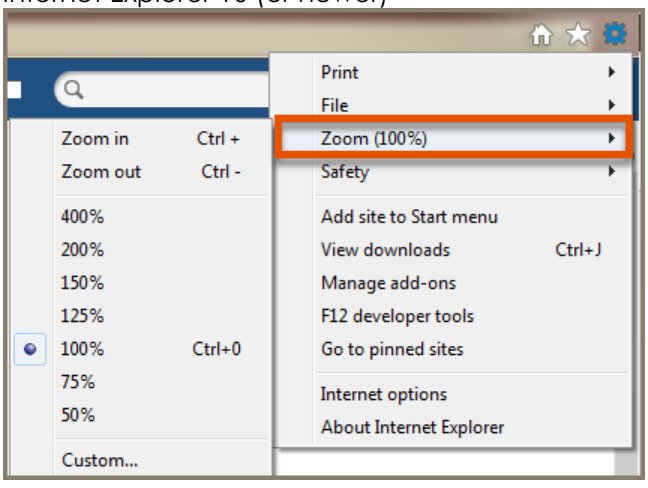
Resolution and Responsive Design

Trupanion's software has been built using responsive design. This means that it will scale appropriately for whatever device or screen resolution you choose to use it on. Note that we do not recommend using the software on a smartphone due to the limited screen space available. The software can also be scaled to your desired size using your browser zoom adjustments.

- Google Chrome



- Internet Explorer 10 (or newer)



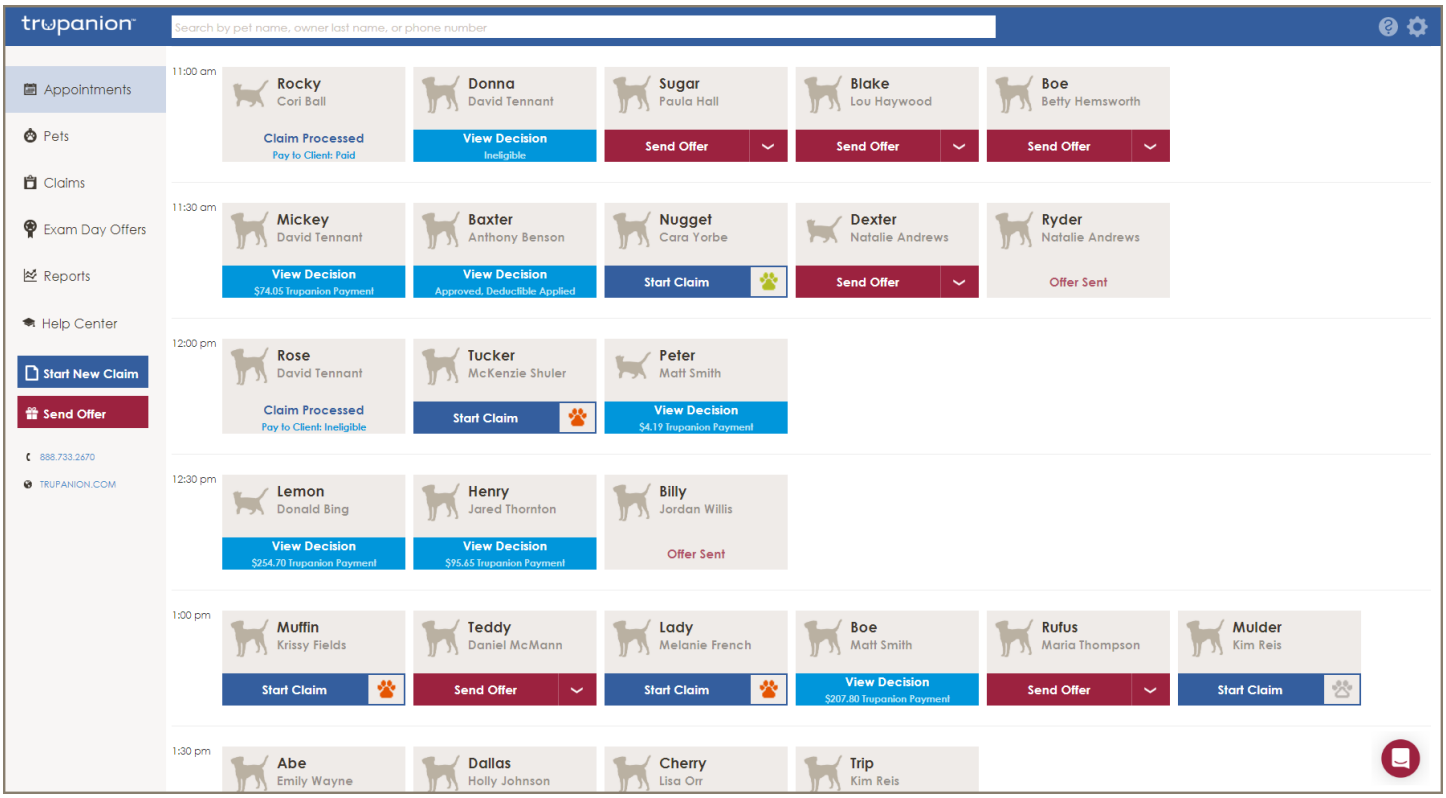
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Navigation and Workflow

Our intuitive navigation and streamlined workflow will make a once cumbersome, manual process, quick and easy! This section will walk you through the navigation and workflow of the software.

General Design

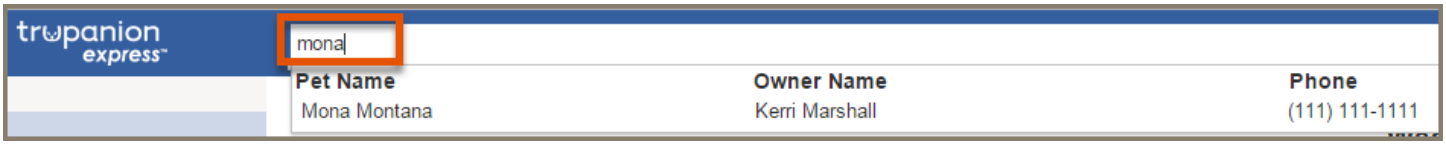
The user interface is modern and uncluttered. Think about what you want to do and you will likely find the option on the screen in front of you. The top bar, which includes the Trupanion Search and Help options, as well as the Main Menu down the left side of the screen, will be with you regardless of what page you are on.



Trupanion Search

The top bar includes the Trupanion Search field. By typing either the pet name, owner last name, or owner phone number in this field, you can find any pet that Trupanion has associated with your hospital. These pets will include:

- Pets with Trupanion policies that have listed you as their primary care provider.
- Pets with Trupanion policies that have filed a claim for services performed at your hospital.
- Pets with Trupanion policies that we were able to automatically link between Trupanion's system and your practice management system database.



To begin a search, simply begin typing your search criteria. As you type, the software will narrow your search results. Once you find the pet you are searching for, click to select. You will then be directed to the pet's profile page.

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Main Menu

The Main Menu is located down the left side of the screen and will be available regardless of which page you are on. It includes the following options:

1. **Appointments** – This is your default Home page. It lists all of the appointments booked in your practice management system appointment scheduler for the current day. Each pet tile will show an action button or message based on the pet's Trupanion status. Using the action buttons, you can quickly send an Exam Day Offer or start a new claim.

2. **Pets** – This page allows you to sort, filter, and page through the list of Trupanion pets associated with your hospital. You can see the pets' Coverage Summary status at-a-glance and are able to click to open the Coverage Summary to view the details. Selecting a pet from this list will take you to the pet's profile page.

3. **Claims** – This page allows you to easily view the status of claims you have submitted.

4. **Exam Day Offers** – This page allows you to easily view the status of the Exam Day Offers you have issued.

5. **Reports** – This page provides at-a-glance information on how Trupanion is impacting your hospital and the pets you care for, as well as readily available reports that assist you in reconciling your Trupanion payments.

6. **Help Center** – This link will navigate you to Trupanion's dedicated Help Center, providing you with a wealth of on-demand training, implementation, and support resources.

7. **Start New Claim Express Link** – This link allows you to easily begin a claim for a pet that was not on the current day's schedule.

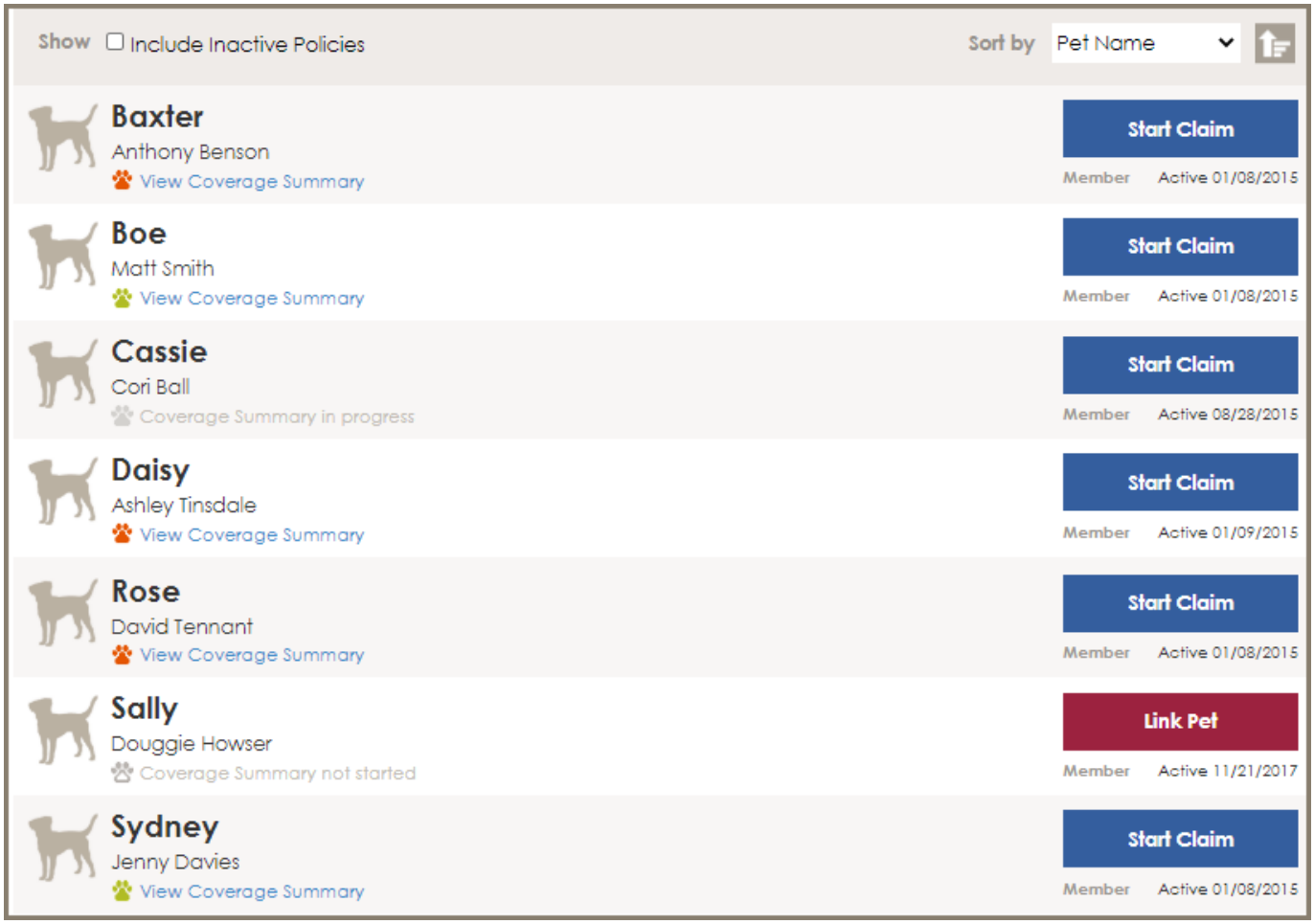
8. **Send Offer Express Link** – This link allows you to easily issue an Exam Day Offer for a pet that was not on the current day's schedule.

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List Navigation

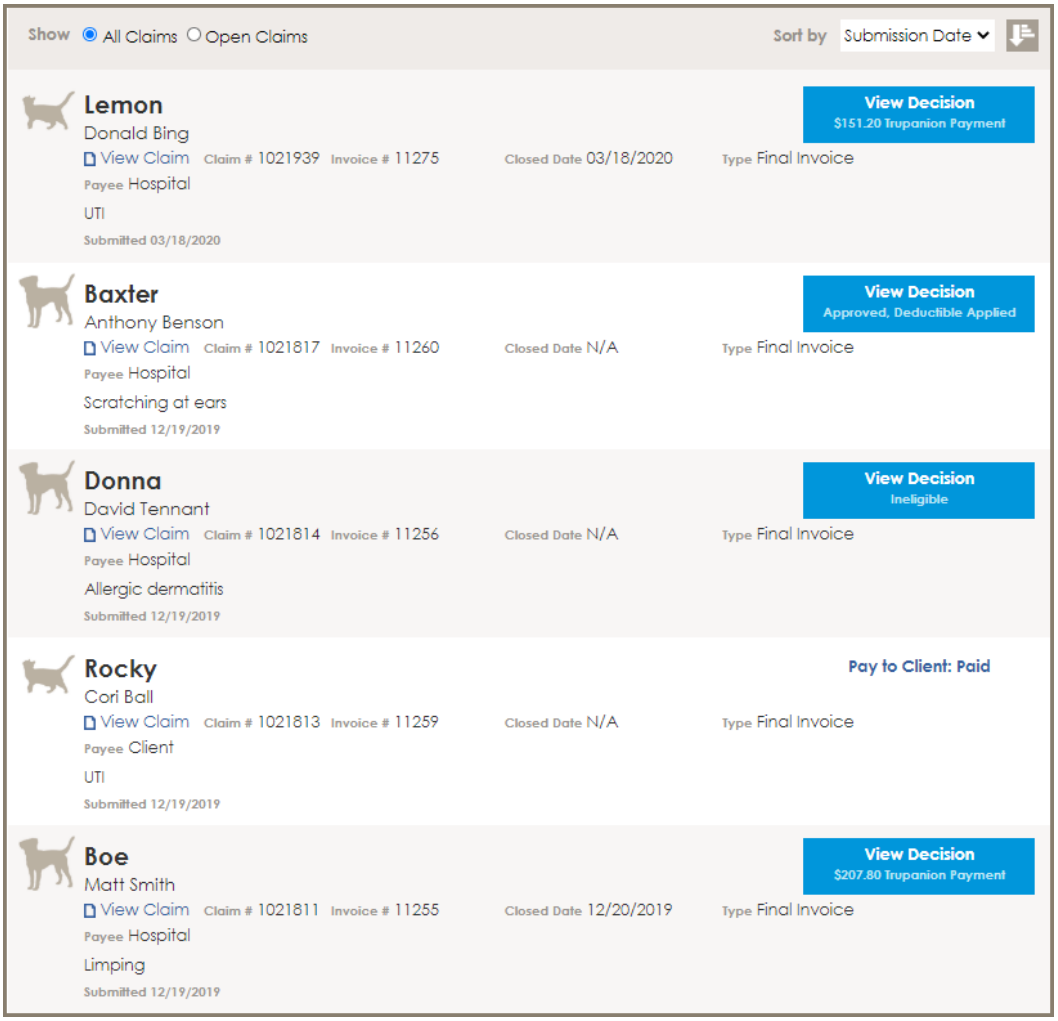
The Pets, Claims, and Offer lists provide customization options for sorting and filtering the available information. The workflow for doing this has been designed to be intuitive while allowing the user to quickly access the information they are looking for.

1. Sort the **Pets** list ascending or descending by Pet Name, Client Name, Enrollment Date, or Unlinked. Inactive policies are excluded by default but can be selected in the view. The list will show:
    a. Pet and Owner Name
    b. Coverage Summary – click on **View Coverage Summary** to see the Coverage Summary details
    c. Active or Inactive Policy Date
    d. Action Button – either **Start Claim** or **Link Hospital Record** based on the patient status



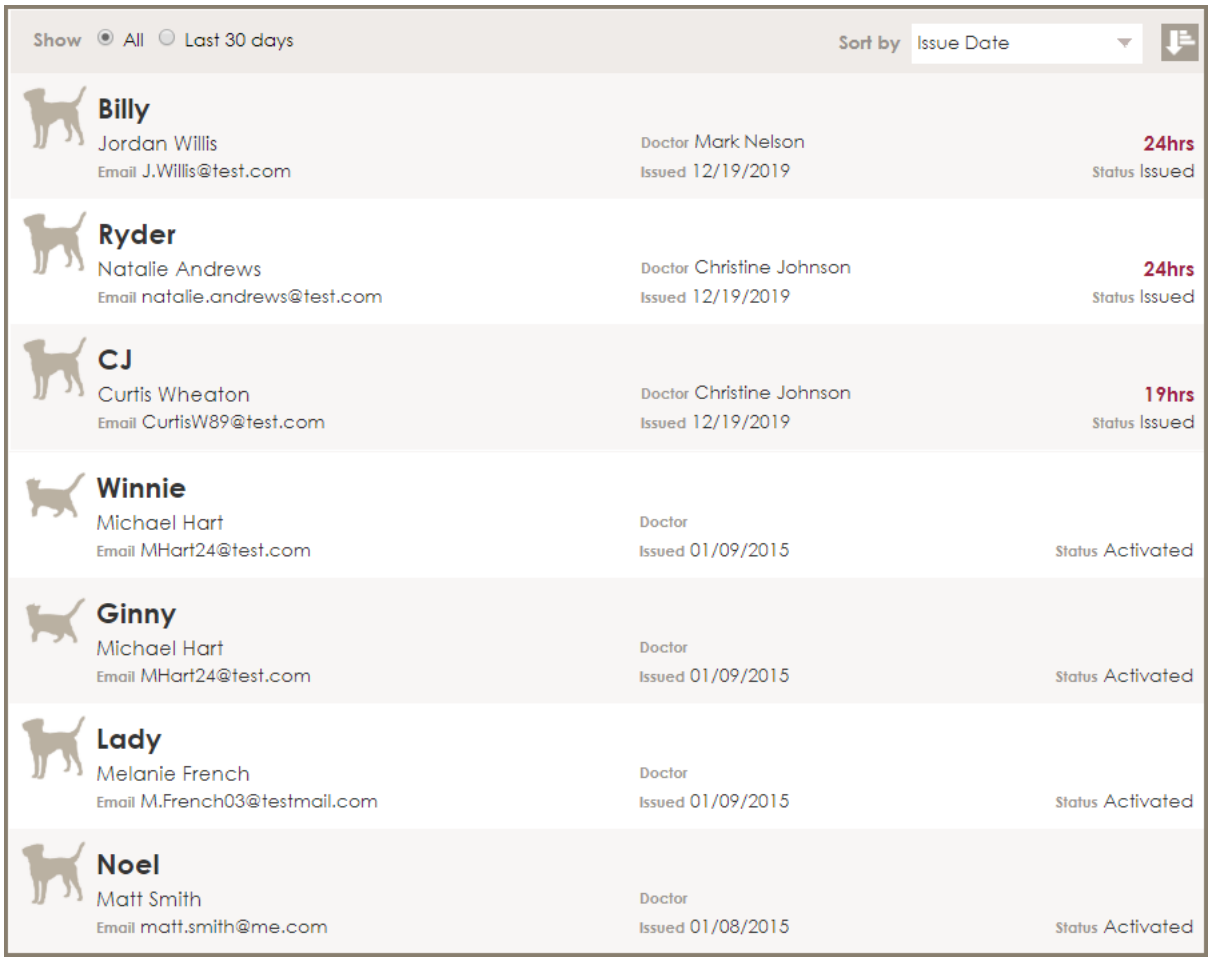
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2. Sort the **Claims** list ascending or descending by Submission Date, Patient Name, Primary Owner, or Payee. You can choose to view all claims or only open claims. The list will show:
    a. Pet and Owner Name
    b. View Claim link – click to view the submitted claim form
    c. Claim # and associated PIMS Invoice #
    d. Closed Date
    e. Final Invoice or Pre-Approval
    f. Payee
    g. Reason for Claim
    h. Claim Status – if a decision letter is available, you can click to view it



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3. Sort the Offers list ascending or descending by Issue Date, Pet Name, or Owner Name. You can choose to view all offers or just the last 30 days of offer activity. The list will show:
    a. Pet and Owner Name
    b. Owner Email
    c. Issued Date
    d. Offer Status



Help

You'll find details on how to contact Trupanion, a link to launch a screen share, an option for sending a non-urgent message to the Vet Support team, and an option to view the current End User License Agreement (EULA) all from the Help option in the top bar of the software.



Settings

Easily change or reset your hospital passphrase from the Settings option in the top bar of the software.

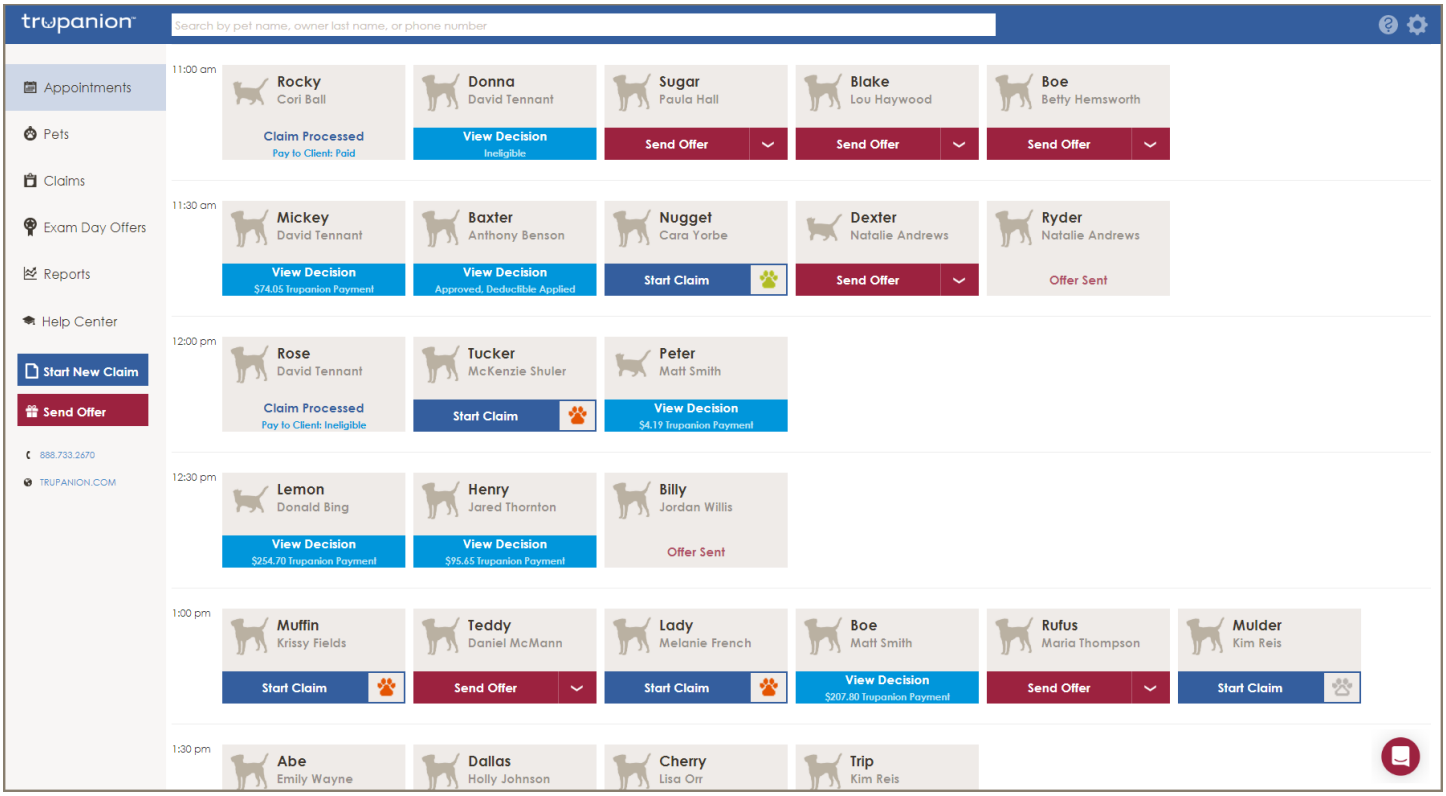


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Appointments

The Appointments page is the starting point for your daily claims and offer activity. Trupanion's software lists all of the appointments booked in your practice management system for the current day in a pet tile format. Appointments are shown in half hour increments with a message of "no appointments for this time" for any of the time intervals that have no appointments scheduled. When you access the Appointments page, it will automatically default to the current time for your convenience.

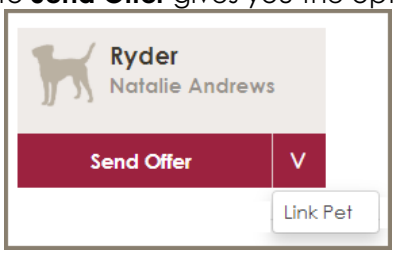
Clicking in the pet/pet owner name area of the pet tile will allow you to quickly access the pet's profile.



Each pet tile will show an action button or message based on the pet's Trupanion status. Using the action buttons, you can quickly send a digital Exam Day Offer, start a new claim, or view a claim decision. Pet tile messages allow you to quickly view the status of a claim or offer.

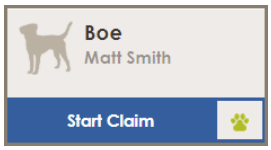
The possible pet tile actions or messages are as follows:

- **Send Offer** – These pets do not have a linked Trupanion policy. Easily send an Exam Day Offer by clicking on the red **Send Offer** button. It is also possible that this pet has a Trupanion policy but we have not been able to link it to a Trupanion pet due to mismatched data (i.e. different name, address, phone, etc.). The drop down arrow next to **Send Offer** gives you the option to **Link Policy** if this is the case.

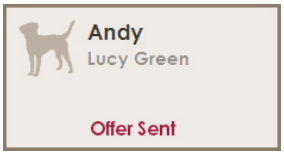


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- **Start Claim** – These pets have a linked Trupanion policy. Easily start a new claim by clicking on the blue **Start Claim** button.



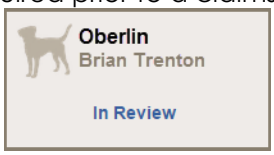
- **Offer Sent** – These pets have been issued an offer within the past 24 hours. They have not yet activated the offer, but still have the ability to do so.



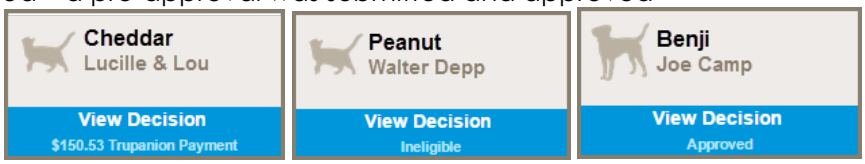
- **Offer Unavailable** – These pets have an inactive policy and are not eligible for an offer. This can occur when a policy has been cancelled or when the pet owner activated an offer but did not enroll for a policy outside of the 30 day offer period.



- **In Review** – The claim for this pet has been received by Trupanion and the claims review process has started. More information may be required prior to a claims decision being issued.



- **View Decision** – The claim for this pet was submitted as **Pay to Hospital** and has been processed. A claims decision has been issued and the decision letter can be accessed by clicking on the blue **View Decision** button. A PDF of the decision letter will download and open in a separate window. It is possible to see several variations of this message.
    - $XXX Trupanion Payment – the claim was paid in the amount listed
    - Ineligible – the claim or pre-approval was not eligible for coverage
    - Approved – a pre-approval was submitted and approved



- **Claim Processed** – The claim for this pet was submitted as **Pay to Client** and has been processed. A claim decision has been issued. Note that the decision letter will not be available to you when the claim was paid to the client. It is possible to see a couple variations of this message.
    - Pay to Client: Paid – the claim was paid
    - Pay to Client: Ineligible – the claim was ineligible for coverage

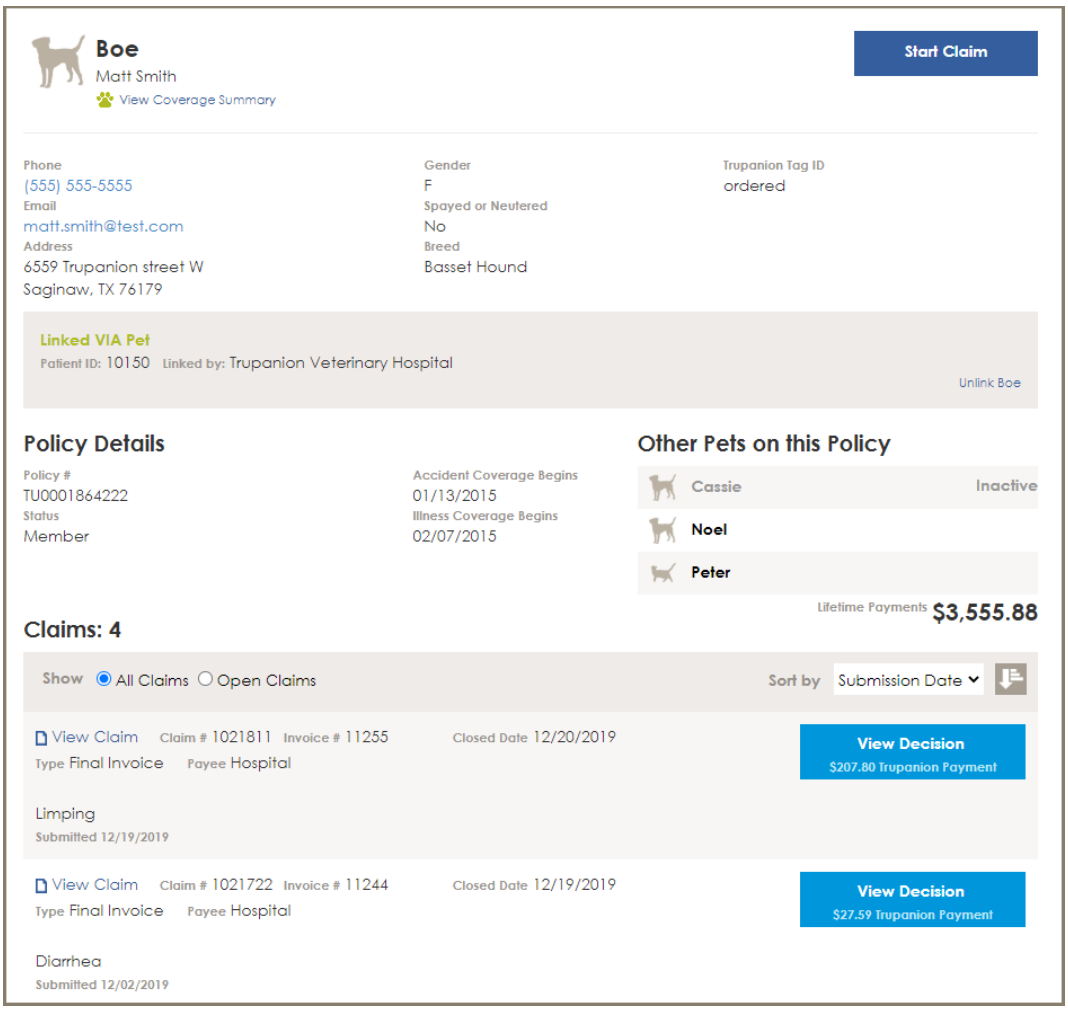


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Pet Profile

The pet profile includes a summary of the pet's policy information, a history of claims submitted to Trupanion, and a link to the pet's record in your practice management system.

The pet profile can be accessed by searching for a pet using the Trupanion Search, located in the top bar of the software, or by clicking on the pet name in various areas of the software. Pet profiles are accessible for any Trupanion pet associated with your hospital.



1. The top section of the pet profile contains the pet and owner names and shows the Coverage Summary color at a glance. You can click on **View Coverage Summary** to see the details of the pet's Coverage Summary. This section also includes a blue **Start Claim** button to allow you to easily start a claim from the pet's profile.
2. The next section contains the pet and owner demographic information. If this information is incorrect, the pet owner will need to contact Trupanion to update it.
3. The linked records section shows the policy linking details. Should the pet be linked incorrectly, the **Unlink Records** option will allow you to unlink the policy and re-link it correctly.
4. The policy details are shown along with any other pets that are on the policy. You can access another pet's profile by clicking on their name from this section.
5. The claims section will show the lifetime Trupanion payments for this pet. It will also allow you to sort, filter, and view claims history for the pet, including any available decision letters.

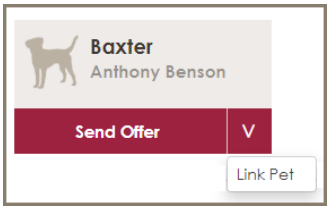
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Linking and Unlinking of Pets

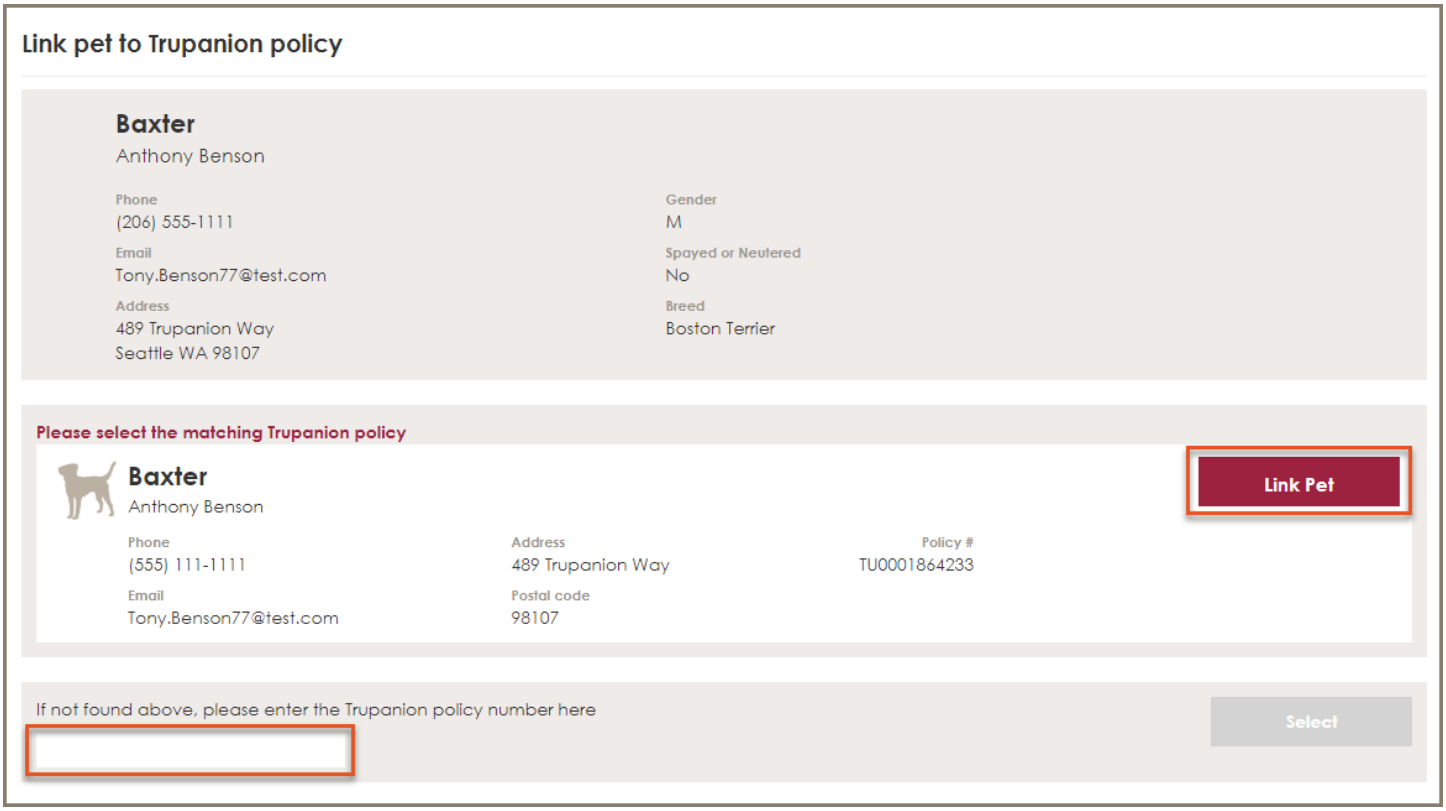
Trupanion's software utilizes a smart matching system to match pets in your practice management system database to pets in the Trupanion member database. This auto-linking process happens at the time of software onboarding and does not occur again unless manually run. If a pet does not show as linked, they can be linked manually at the time of a claim.

Linking from Appointments

1. From Appointments, click the drop down arrow next to the red **Send Offer** button and choose **Link Policy**.



1. If there is a matching record found, click **Link Policy**. If one is not found, enter the Trupanion policy number and click **Select**.



2. If there are multiple pets on the policy, select the appropriate pet and click **Confirm.** You will be directed to the claim form for the selected pet.

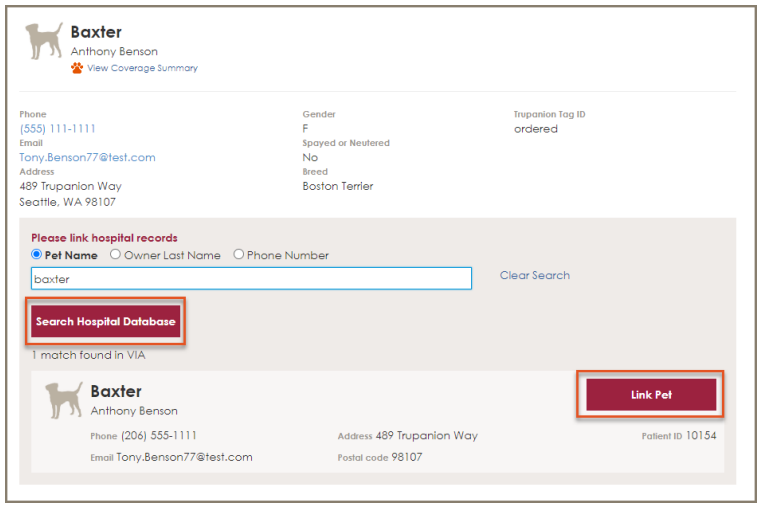
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Linking from the Pets Page

1. To link a pet from the Pets page, click the **Link Hospital Record** button to the right of the pet name.



2. The pet profile will open, allowing you to search for the hospital record in your practice management system. Enter either the Pet Name, Owner Name, or Phone Number and click **Search Hospital Database**. When a matching record is found, choose **Link Policy**.

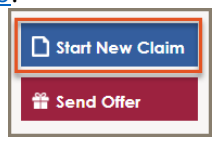


3. Confirm that the pet owner information matches and select **Yes, please link these.**

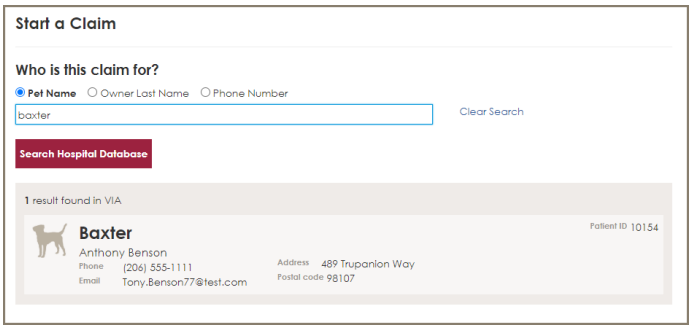
4. The pet profile will now show a linked practice management system record.

Linking from the Start New Claim Express Link

1. Select **Start New Claim** in the Main Menu.

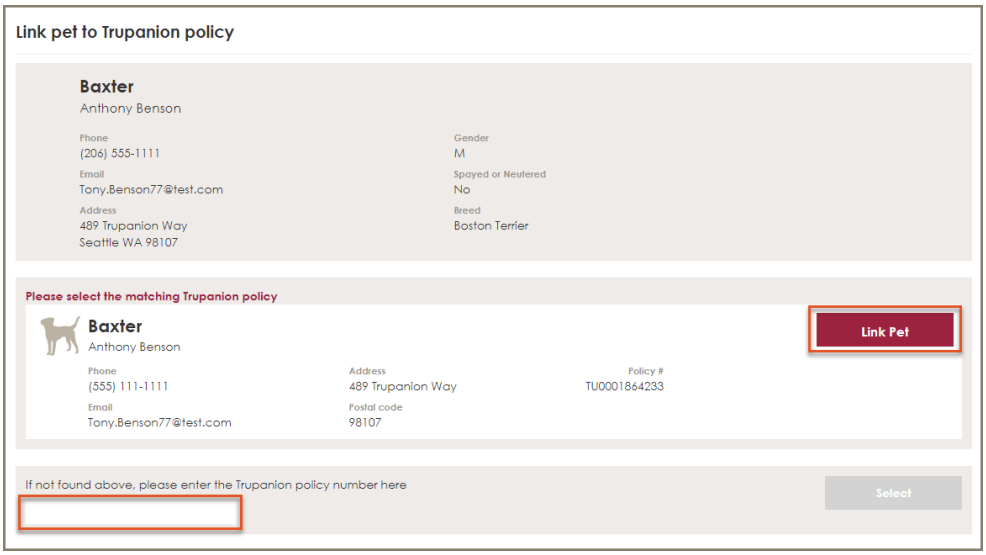


2. Search for the pet by entering either the Pet Name, Owner Last Name, or Phone Number and clicking **Search Hospital Database**. Select the pet from the list of search results.



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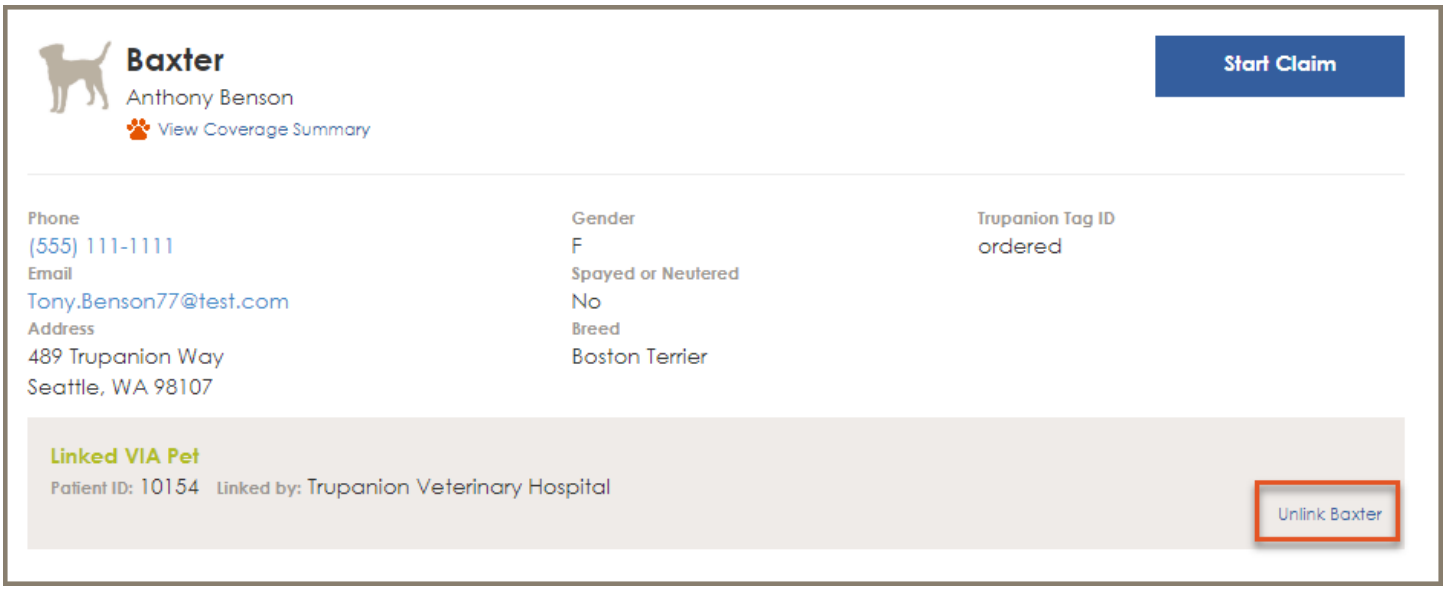
3. If there is a matching policy record found, click **Link Policy**. If one is not found, enter the Trupanion Policy number and click **Select.**



5. If there are multiple pets on the policy, select the appropriate pet and click **Confirm.** You will be directed to the claim form for the selected pet.

Unlinking a Pet from the Pet Profile

To unlink a pet if they are linked incorrectly, go to the pet profile and select **Unlink Records**. Keep in mind that if two pets have been incorrectly linked with the other's policy information, both pets must be unlinked before you can select the correct records. If a link is being used, it is not available to use for another pet.



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Trupanion Exam Day Offers

Issuing Exam Day Offers is a great way to introduce your pet owners to Trupanion. There are a couple important things to be aware of when issuing Exam Day Offers.

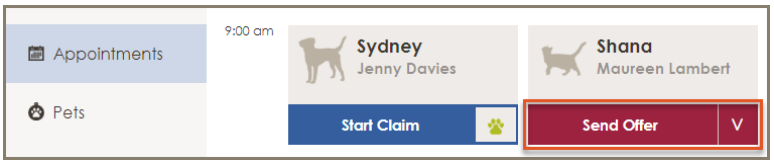
- Offers can only be issued following a veterinary exam.
- The pet owner has 24 hours to activate the offer before it is no longer valid.
- Waiting periods are waived because the pet had an exam on the day the offer was issued.

Issuing an Exam Day Offer

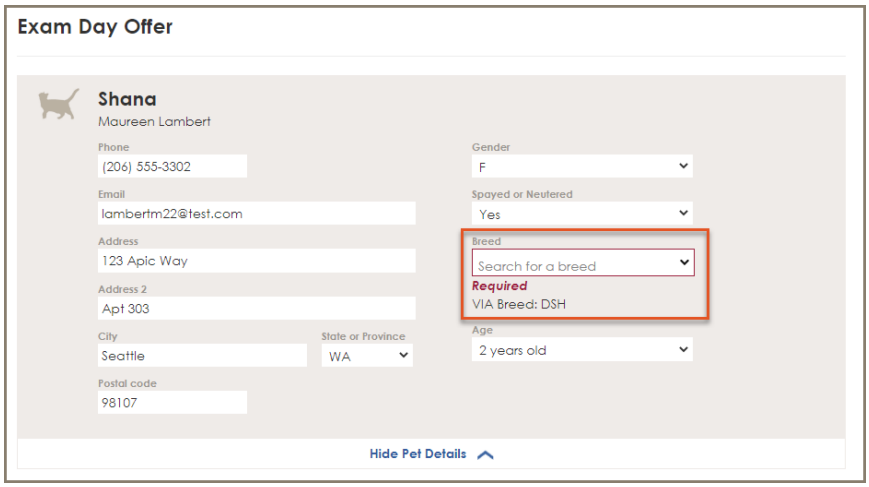
Trupanion's software makes it very easy to issue Exam Day Offers.

From Appointments

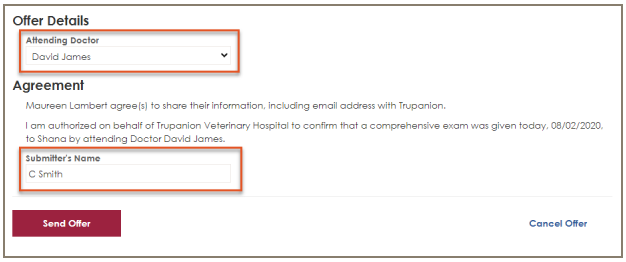
1. From the pet tile, click the red **Send Offer** button.



2. Confirm the client and patient information from your practice management system, and complete any fields that were not pre-filled. Since the list of breeds can vary dramatically from hospital to hospital, Trupanion has a standardized breed list. If your breed does not match ours, you will need to select a breed from our standardized list. Your practice management system breed is shown as a guide for selecting a Trupanion breed.

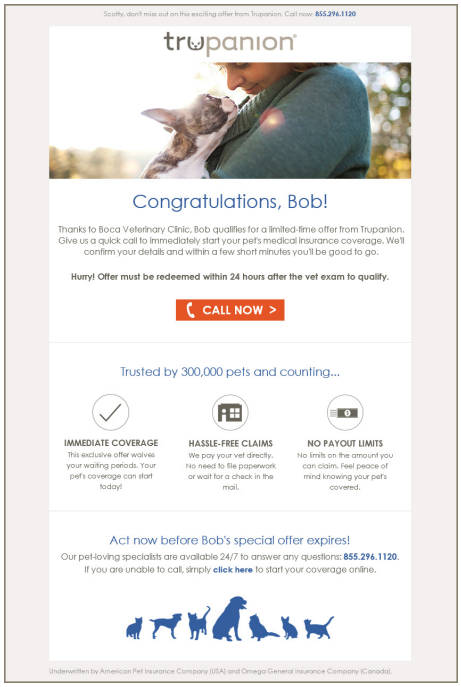


3. Select the Attending DVM from the drop down list and type your name in the Submitter's Name field. Click **Send Offer**.



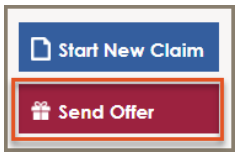
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4. The pet owner should immediately receive the Exam Day Offer via email and/or text. They must **activate** their offer within 24 hours after the veterinary exam in order to receive coverage.

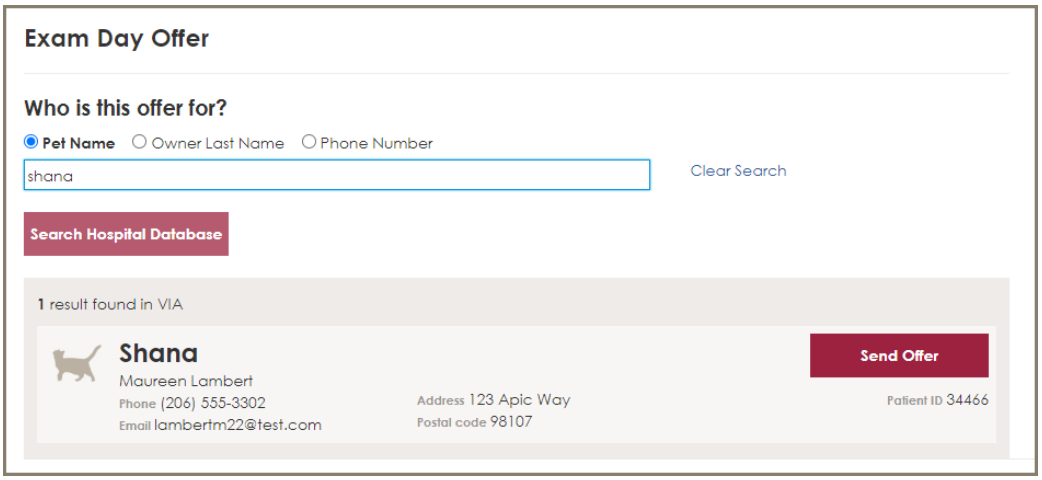


From the Send Offer Express Link

1. Click the **Send Offer Express Link** from the Main Menu.

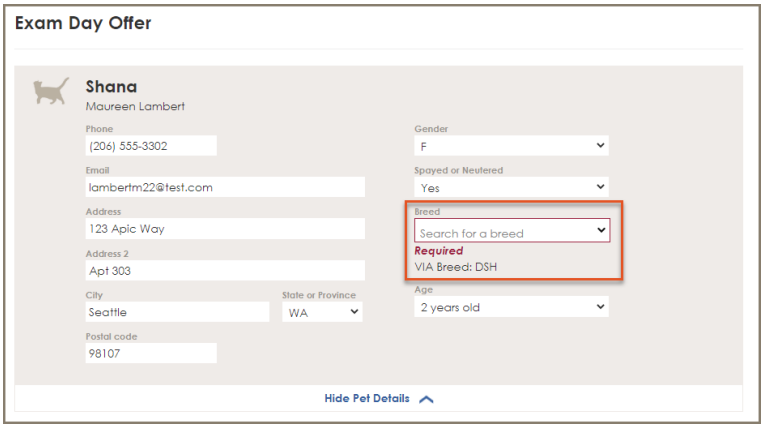


2. Search for the pet by entering either the Pet Name, Owner Last Name, or Phone Number and clicking **Search Hospital Database**. Select the pet from the list of search results and click **Send Offer**.

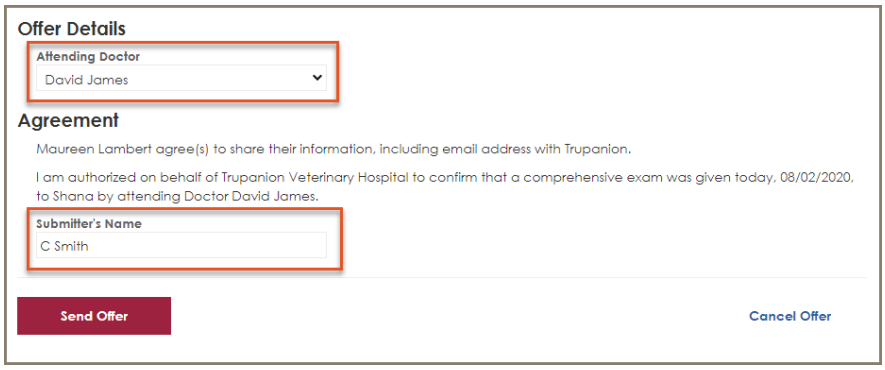


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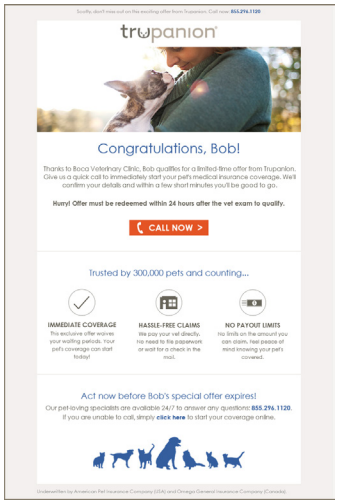
3. Confirm the client and patient information from your practice management system, and complete any fields that were not pre-filled. Since the list of breeds can vary dramatically from hospital to hospital, Trupanion has a standardized breed list. If your breed does not match ours, you will need to select a breed from our standardized list. Your practice management system breed is shown as a guide for selecting a Trupanion breed.



4. Select the Attending DVM from the drop down list and type your name in the Submitter's Name field. Click **Send Offer**.
5.



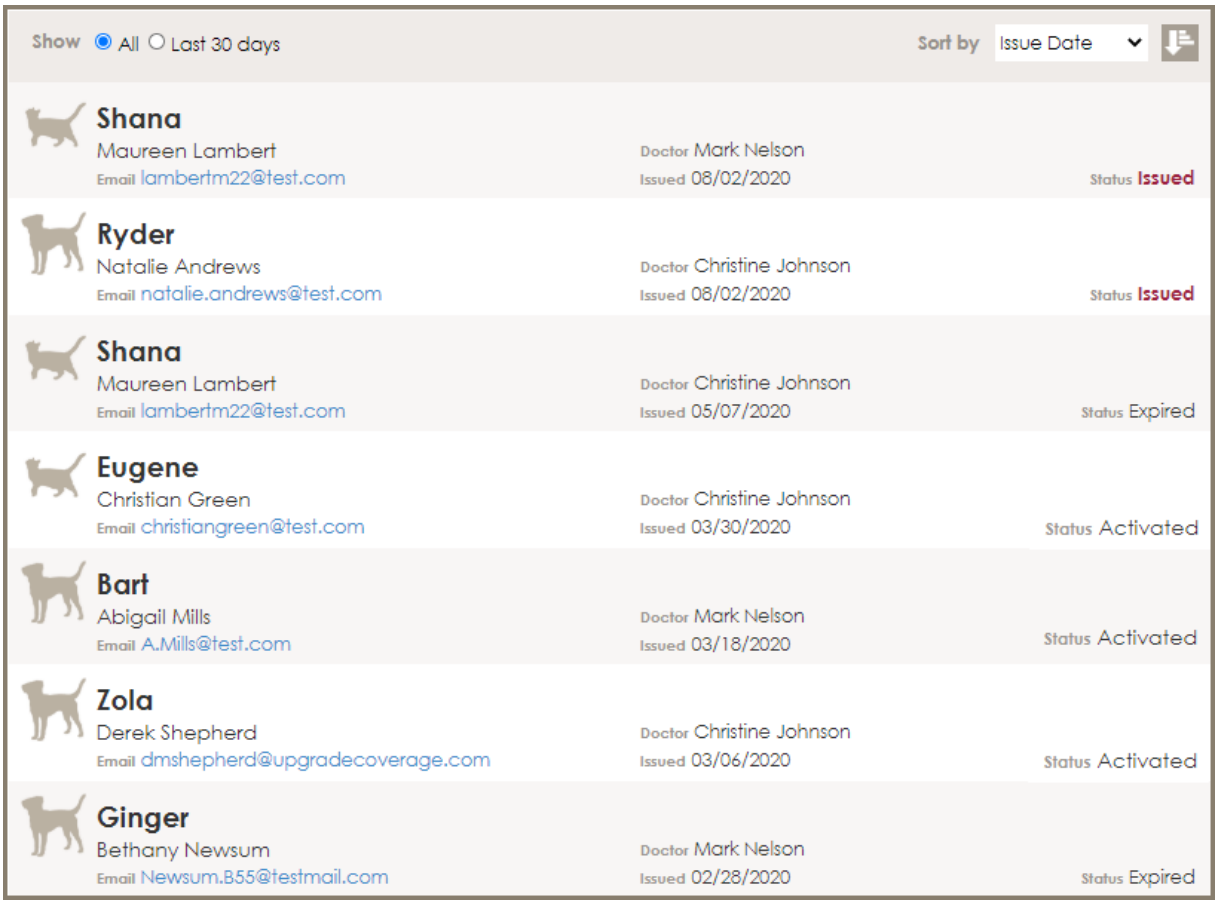
6. The pet owner should immediately receive the Exam Day Offer via email and/or text. They must **activate** their offer within 24 hours after the veterinary exam in order to receive coverage.



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Checking Offer Status

It's easy to view the status of the offers issued by your hospital. Begin by selecting **Offers** from the Main Menu. Sort and filter the list as desired. The details for each offer, along with the offer status, are shown for each pet.



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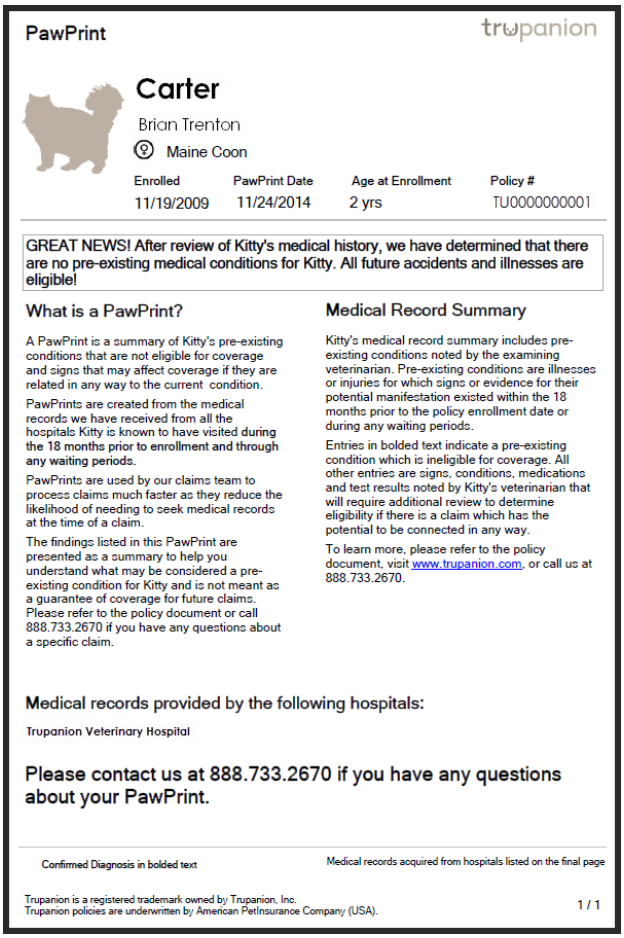
Coverage Summaries

A Coverage Summary is Trupanion's guide to a pet's medical history and is created from the medical records received from all the hospitals a pet is known to have visited prior to enrollment and through any waiting periods. The Coverage Summary lists pre-existing conditions and/or signs for the pet and provides both the hospital and the pet owner with insight into what will be eligible for coverage during a visit.

The color of the Coverage Summary icon indicates if the pet has pre-existing conditions which may not be covered.

Green Coverage Summary

A green Coverage Summary indicates the pet has no pre-existing conditions or signs. Anything covered under the Trupanion policy will be covered for this pet. Submit these claims as **Pay to Hospital**.



PawPrint

trupanion

Carter

Brian Trenton

Maine Coon

Enrolled	PawPrint Date	Age at Enrollment	Policy #
11/19/2009	11/24/2014	2 yrs	TU0000000001

GREAT NEWS! After review of Kitty's medical history, we have determined that there are no pre-existing medical conditions for Kitty. All future accidents and illnesses are eligible!

What is a PawPrint?

A PawPrint is a summary of Kitty's pre-existing conditions that are not eligible for coverage and signs that may affect coverage if they are related in any way to the current condition.

PawPrints are created from the medical records we have received from all the hospitals Kitty is known to have visited during the 18 months prior to enrollment and through any waiting periods.

PawPrints are used by our claims team to process claims much faster as they reduce the likelihood of needing to seek medical records at the time of a claim.

The findings listed in this PawPrint are presented as a summary to help you understand what may be considered a pre-existing condition for Kitty and is not meant as a guarantee of coverage for future claims. Please refer to the policy document or call 888.733.2670 if you have any questions about a specific claim.

Medical Record Summary

Kitty's medical record summary includes pre-existing conditions noted by the examining veterinarian. Pre-existing conditions are illnesses or injuries for which signs or evidence for their potential manifestation existed within the 18 months prior to the policy enrollment date or during any waiting periods.

Entries in bolded text indicate a pre-existing condition which is ineligible for coverage. All other entries are signs, conditions, medications and test results noted by Kitty's veterinarian that will require additional review to determine eligibility if there is a claim which has the potential to be connected in any way.

To learn more, please refer to the policy document, visit www.trupanion.com, or call us at 888.733.2670.

Medical records provided by the following hospitals:

Trupanion Veterinary Hospital

Please contact us at 888.733.2670 if you have any questions about your PawPrint.

Confirmed Diagnosis in bolded text

Medical records acquired from hospitals listed on the final page

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1 / 1

Orange Coverage Summary

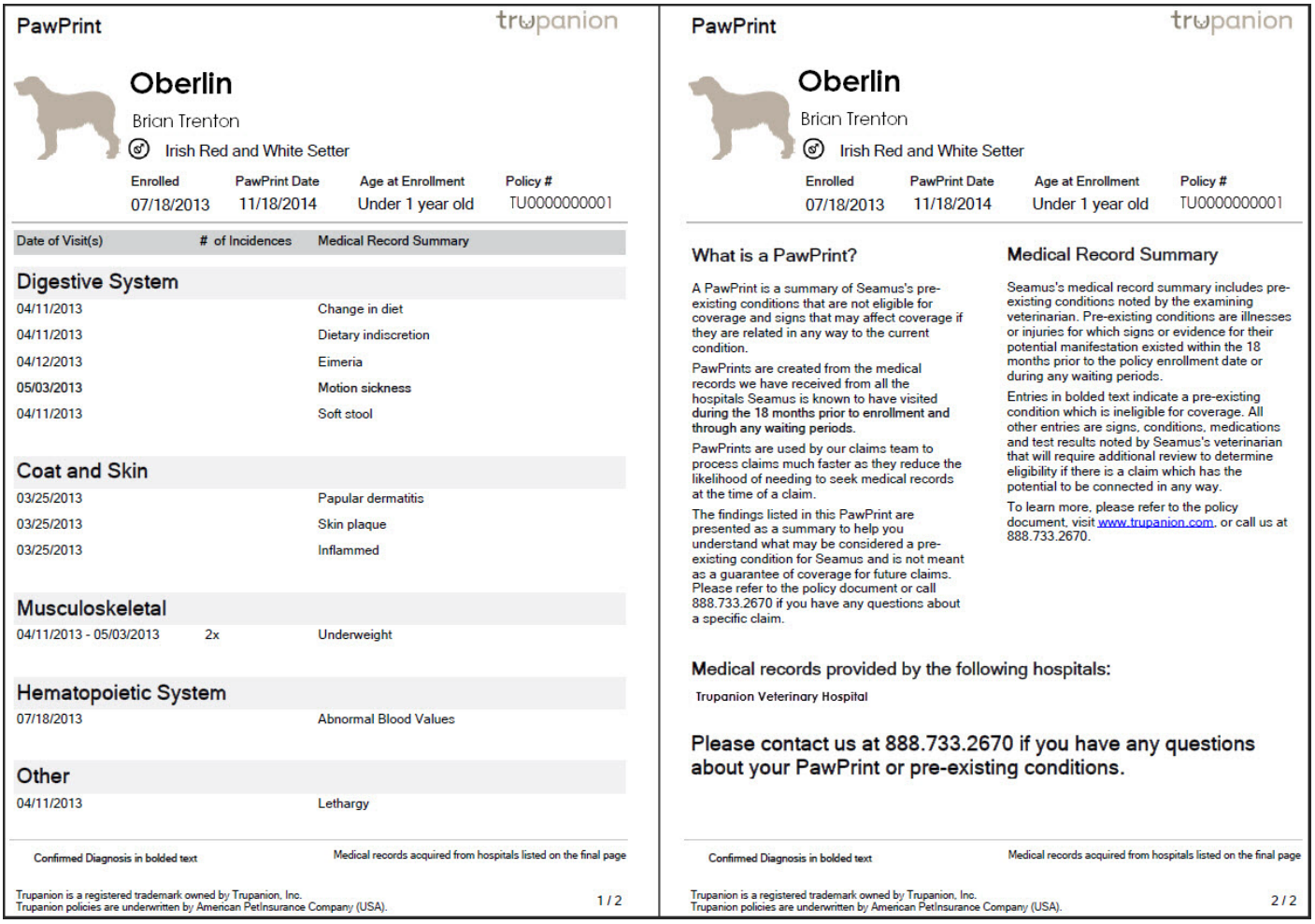
An orange Coverage Summary indicates the pet has one or more pre-existing conditions or signs which may not be covered. Please review the Coverage Summary details to understand which conditions are considered pre-existing.

- Unless the signs or conditions for the visit are obviously related to the signs and conditions in the Coverage Summary, claims for orange Coverage Summaries should be submitted as **Pay to Hospital**.

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- If you feel certain that the entire visit is for a pre-existing condition, or if you are only performing preventative care, we do not recommend submitting the claim as claim denials can create a poor experience for the pet owner. If the owner insists that the claim be submitted, choose the **Pay to Client** option.

- To maximize your time efficiency, run pre-approvals **only** if the pet owner would change the course of treatment due to lack of coverage on a pre-existing condition.



PawPrint — trupanion

Oberlin
Brian Trenton
Irish Red and White Setter

Enrolled	PawPrint Date	Age at Enrollment	Policy #
07/18/2013	11/18/2014	Under 1 year old	TU0000000001

Date of Visit(s)	# of Incidences	Medical Record Summary
Digestive System		
04/11/2013		Change in diet
04/11/2013		Dietary indiscretion
04/12/2013		Eimeria
05/03/2013		**Motion sickness**
04/11/2013		Soft stool
Coat and Skin		
03/25/2013		Papular dermatitis
03/25/2013		Skin plaque
03/25/2013		Inflammed
Musculoskeletal		
04/11/2013 - 05/03/2013	2x	Underweight
Hematopoietic System		
07/18/2013		Abnormal Blood Values
Other		
04/11/2013		Lethargy

Confirmed Diagnosis in bolded text
Medical records acquired from hospitals listed on the final page

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PawPrint — trupanion

Oberlin
Brian Trenton
Irish Red and White Setter

Enrolled	PawPrint Date	Age at Enrollment	Policy #
07/18/2013	11/18/2014	Under 1 year old	TU0000000001

What is a PawPrint?

A PawPrint is a summary of Seamus's pre-existing conditions that are not eligible for coverage and signs that may affect coverage if they are related in any way to the current condition.

PawPrints are created from the medical records we have received from all the hospitals Seamus is known to have visited **during the 18 months prior to enrollment and through any waiting periods.**

PawPrints are used by our claims team to process claims much faster as they reduce the likelihood of needing to seek medical records at the time of a claim.

The findings listed in this PawPrint are presented as a summary to help you understand what may be considered a pre-existing condition for Seamus and is not meant as a guarantee of coverage for future claims. Please refer to the policy document or call 888.733.2670 if you have any questions about a specific claim.

Medical Record Summary

Seamus's medical record summary includes pre-existing conditions noted by the examining veterinarian. Pre-existing conditions are illnesses or injuries for which signs or evidence for their potential manifestation existed within the 18 months prior to the policy enrollment date or during any waiting periods.

Entries in bolded text indicate a pre-existing condition which is ineligible for coverage. All other entries are signs, conditions, medications and test results noted by Seamus's veterinarian that will require additional review to determine eligibility if there is a claim which has the potential to be connected in any way.

To learn more, please refer to the policy document, visit www.trupanion.com, or call us at 888.733.2670.

Medical records provided by the following hospitals:

Trupanion Veterinary Hospital

Please contact us at 888.733.2670 if you have any questions about your PawPrint or pre-existing conditions.

Confirmed Diagnosis in bolded text
Medical records acquired from hospitals listed on the final page

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Trupanion policies are underwritten by American PetInsurance Company (USA). 2 / 2

Grey Coverage Summary

A grey Coverage Summary indicates the pet's Coverage Summary has not been completed. Often a grey Coverage Summary is the result of missing medical records from another hospital. Except in the case of an accident where pre-existing conditions are not applicable, you'll typically want to submit these claims as **Pay to Client**.

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Trupanion Claims

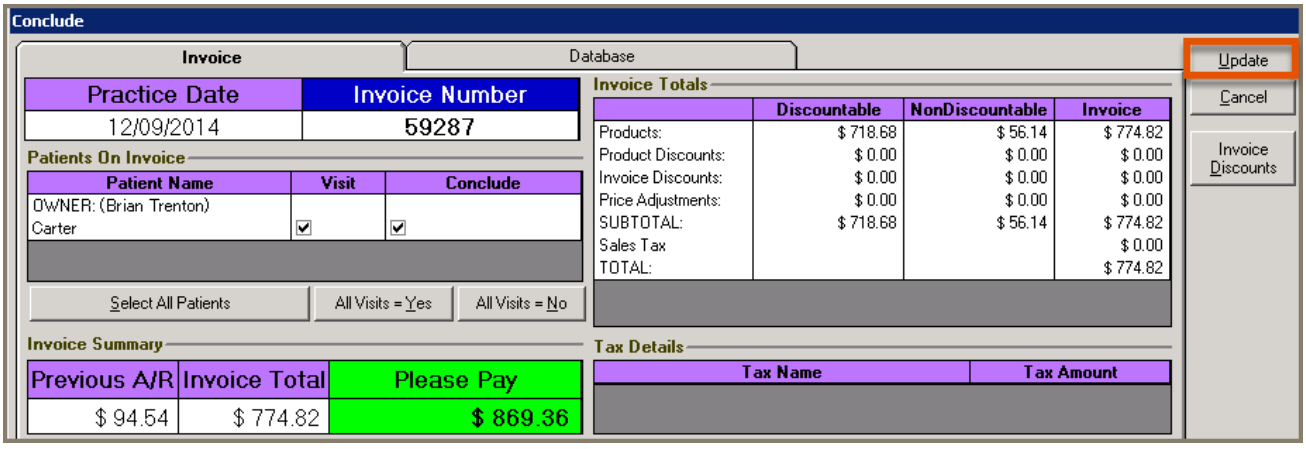
Trupanion's software makes the claim filing process quick and easy. No more filing out and faxing forms, No more endless faxing of medical history at the time of a claim, and most importantly, no more painful reimbursement model that doesn't solve the problem for your pet owners. Through our software, Trupanion is able to process over 80% of claims within 5 minutes or less (sometimes in seconds) and pay your hospital directly via direct deposit. This means your pet owner completes their checkout process as normal and only pays their portion of the claim – Trupanion picks up the rest of the bill.

Posting the Invoice

Prior to starting your claim, it's important to make sure that your invoice is in a state that allows the software to access it.

1. Create and **Conclude** the invoice in ***ImproMed***.

2. Click **Update** on the payment window (do not add any payments yet). This will fully conclude the invoice and it will now be available in Trupanion's software.

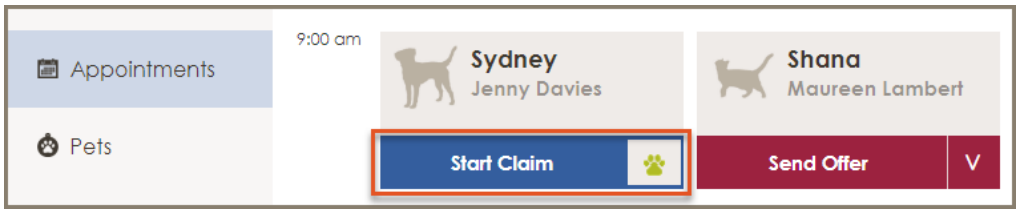


Submitting a Claim

Now that your invoice is available in, you can begin the claims process.

Start the Claim

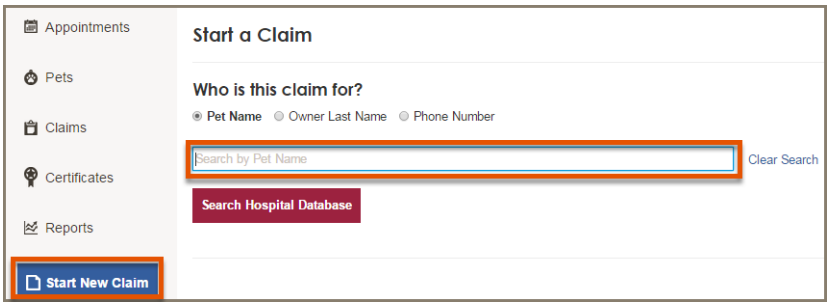
From the Appointments page in **Trupanion's software**, click the blue **Start Claim** button on the pet tile.



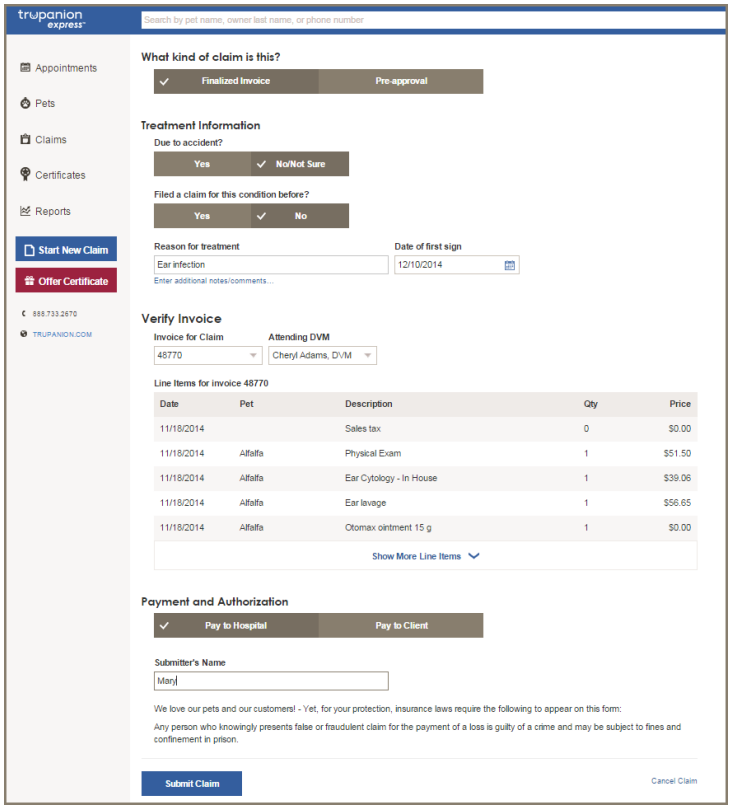
OR

If the pet was not on the appointment schedule for today, click the **Start New Claim Express Link** from the Main Menu and search for the pet.

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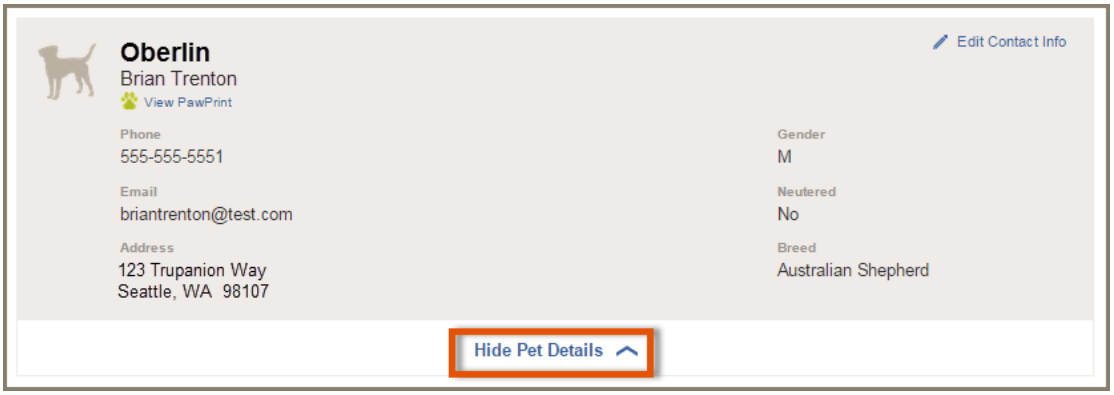


You will be presented with the claim form.



Pet Details

Generally the pet details will be hidden. You have the ability to Show and Hide the pet details as needed.



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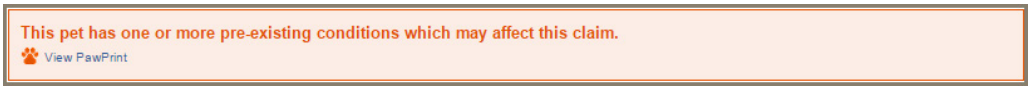
Review the Coverage Summary

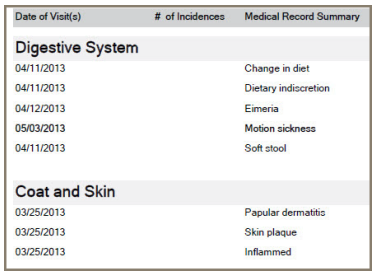
The Coverage Summary is a tool for understanding what may be pre-existing for a pet.

- If the Coverage Summary is grey, Trupanion does not have the necessary medical records for the pet and will be unable to process the claim within 5 minutes. Proceed with submitting your claim as **Pay to Client**.
    - The exception to this would be if the pet's visit is due to an accident for which pre-existing signs or conditions would not apply (i.e. hit by car). In this instance, you can proceed with submitting your claim as **Pay to Hospital**.

- If the Coverage Summary is green, proceed with submitting your claim as **Pay to Hospital**.
    - Keep in mind that policy exclusions apply. Refrain from submitting claims for invoices that only include preventative care as these items are not covered under the Trupanion policy.

- If the Coverage Summary is orange, click **View Coverage Summary** to review the details. Unless the signs or conditions for the visit are related to the signs and conditions in the Coverage Summary, claims for orange Coverage Summaries should be submitted as **Pay to Hospital**. Keep in mind that even if the Coverage Summary lists a condition similar to that of the pet's current visit (i.e. diarrhea), most signs or conditions can easily be connected or disconnected. If you can disconnect the current condition from a condition in the Coverage Summary, you can provide an exceptional customer experience for the pet owner by submitting the claim as **Pay to Hospital**.





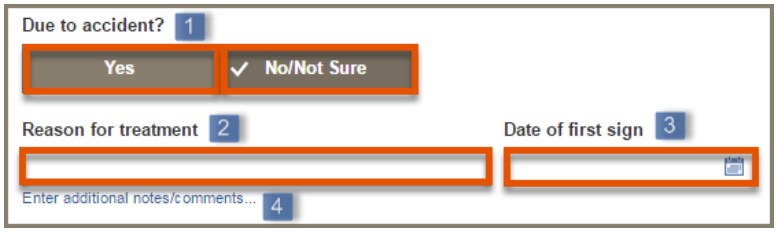
Date of Visit(s)	# of Incidences	Medical Record Summary
Digestive System		
04/11/2013		Change in diet
04/11/2013		Dietary indiscretion
04/12/2013		Eimeria
05/03/2013		Motion sickness
04/11/2013		Soft stool
Coat and Skin		
03/25/2013		Papular dermatitis
03/25/2013		Skin plaque
03/25/2013		Inflammed

Complete the Claim

1. Confirm that **Finalized Invoice** is selected.



2. 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 claim visit. Adding more detail can help expedite claims processing.

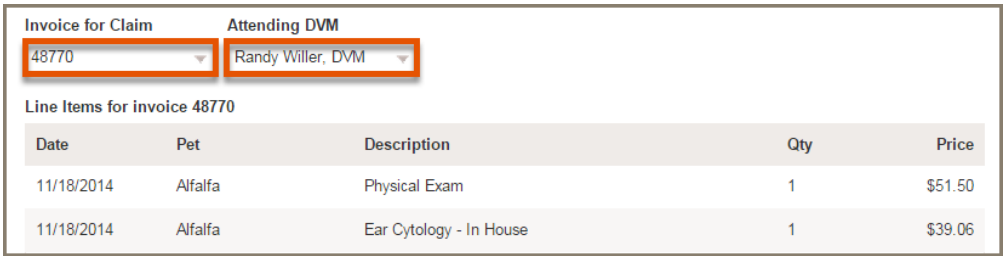


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3. If a claim has previously been filed for the condition, click **Yes** and you will have the ability to select the previous claim. This will pre-fill the Reason for treatment and Date of first sign. Click **Enter additional notes/comments** to add more detail about the claim visit. Note that this option will not be available if the pet has not had any prior claims at your hospital.



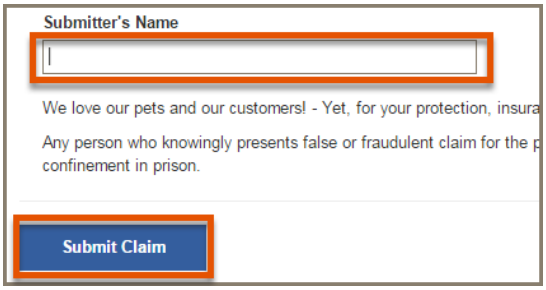
4. Confirm the correct invoice and Attending DVM are selected, or select the correct information from the drop downs lists. The most recent invoice will be selected by default.



5. Confirm the payment as **Pay to Hospital** or select **Pay to Client** if necessary. Generally **Pay to Hospital** should be used. **Pay to Client** should be used if you are unsure if the claim is related to a pre-existing condition in the Coverage Summary or for pets with a grey Coverage Summary who are being seen for an illness instead of an accident.



6. Type your name in the Submitter's Name and click **Submit Claim**.

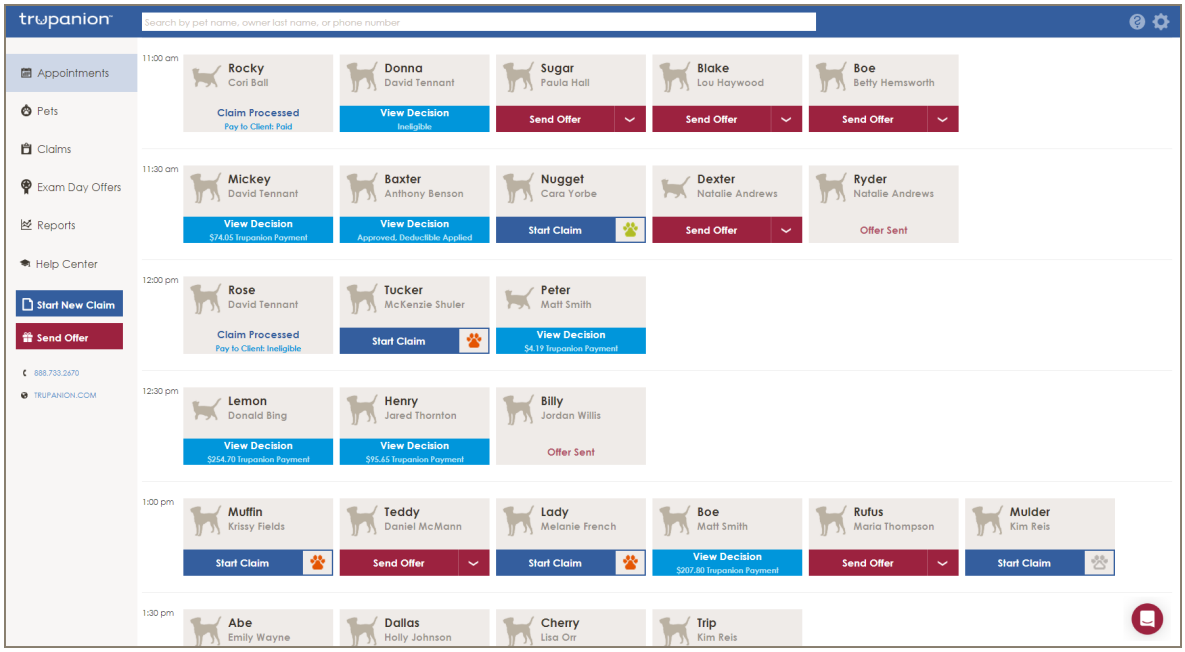


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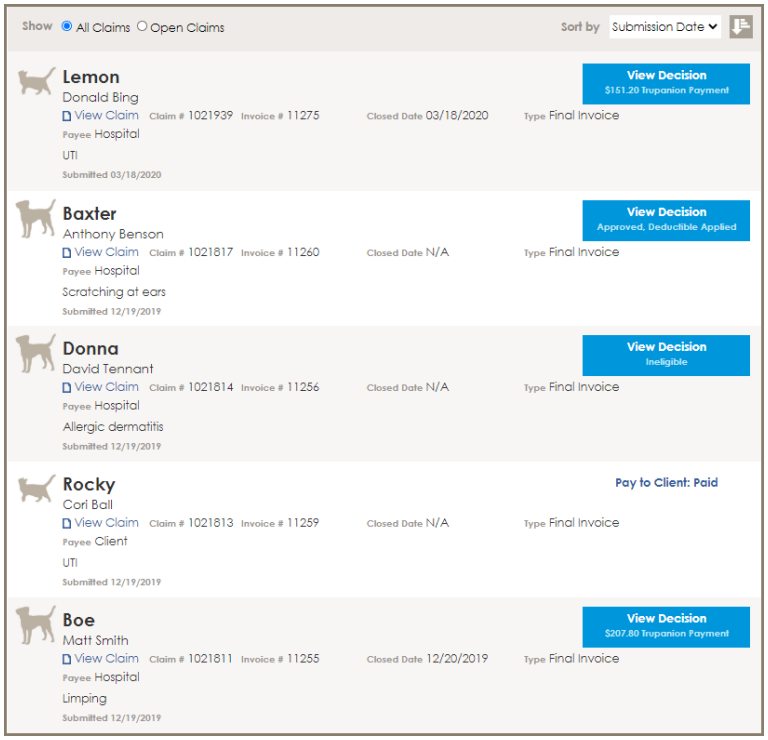
Checking Claims Status

In most cases, you should receive a claims decision within 5 minutes or less. If the claims team requires more time, or needs to gather more information from the hospital, they will notify you.

Claims status can be viewed from the pet tile on the **Appointments** page or from the **Claims** page directly. These pages will auto-refresh once the information has changed.



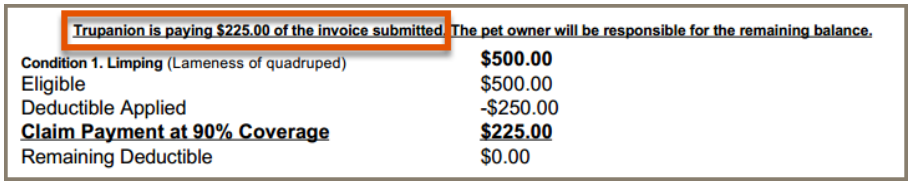
From Appointments



From Claims

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1. Open the decision letter by clicking on the blue **View Decision** button and review the payment information.

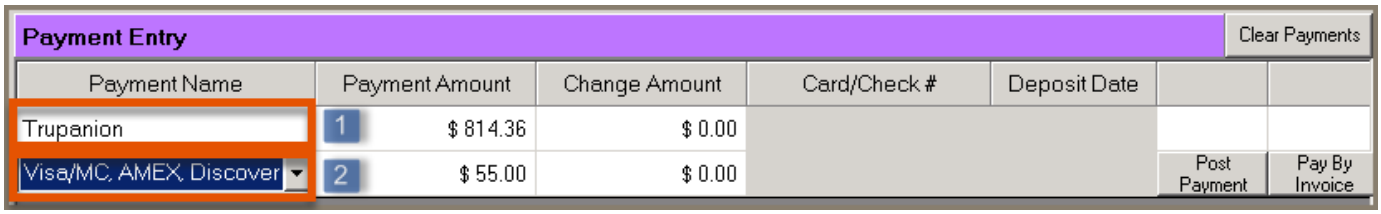


2. The letter will contain information regarding the pet owner's deductible, eligible and non-eligible invoice items, and the amount Trupanion is paying directly to your hospital. Any remaining balance will be the pet owner's responsibility.

Adding the Trupanion Payment

You are now ready to add the Trupanion payment into your practice management system and complete the pet owner's checkout process.

In ***ImproMed***, access the payment screen for the client. Select the Trupanion payment type and enter the amount from the decision letter. On the next payment line, select the client's payment type and enter the remaining balance as the payment amount.



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Trupanion Pre-Approvals

Trupanion's software makes it easy to submit a pre-approval when one is needed. However, to maximize your time efficiency, run pre-approvals **only** if the pet owner would change the course of treatment due to lack of coverage on a pre-existing condition. Since Trupanion processes claims so quickly, it is a much better experience for you, the pet, and the pet owner if you proceed with treatment, complete the invoice, and submit the claim for processing. This avoids any unnecessary delays in the care of the pet.

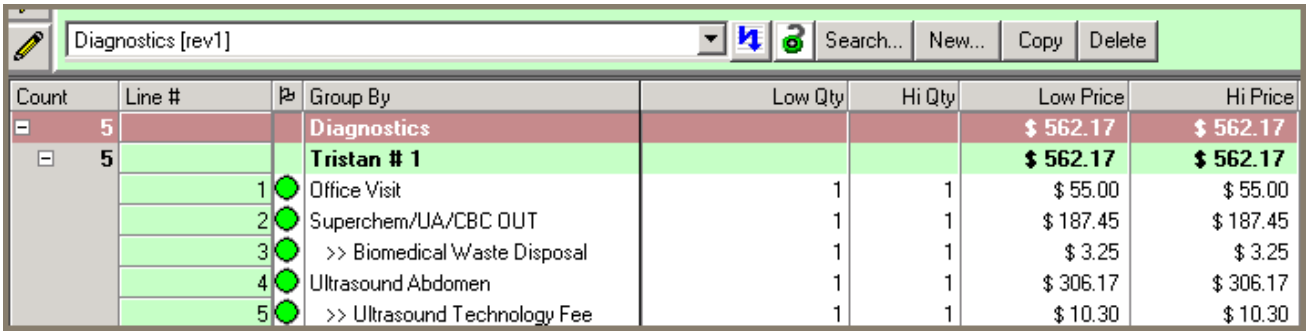
If you do proceed with a pre-approval, you will then need to complete and submit the claim once the invoice is complete. Trupanion will only pay based on a finalized claim. Pre-approvals are only intended to provide coverage information for the condition and are not finalized claims.

Saving the Estimate or Posting the Invoice

Prior to starting your claim, it's important to make sure that your estimate or invoice is in a state that allows the software to access it.

Saving an Estimate

In ***ImproMed***, create the estimate following your normal procedure. Make sure that your estimate is saved.

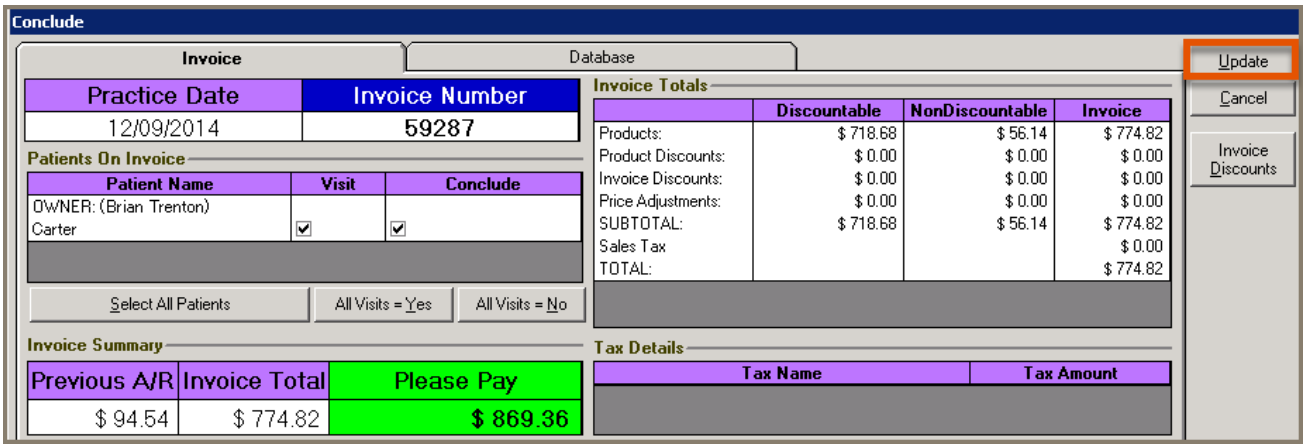


Count	Line #	Group By	Low Qty	Hi Qty	Low Price	Hi Price
5		Diagnostics			$ 562.17	$ 562.17
5		Tristan # 1			$ 562.17	$ 562.17
	1	Office Visit	1	1	$ 55.00	$ 55.00
	2	Superchem/UA/CBC OUT	1	1	$ 187.45	$ 187.45
	3	>> Biomedical Waste Disposal	1	1	$ 3.25	$ 3.25
	4	Ultrasound Abdomen	1	1	$ 306.17	$ 306.17
	5	>> Ultrasound Technology Fee	1	1	$ 10.30	$ 10.30

Posting an Invoice

1. Create and **Conclude** the invoice in ***ImproMed***.

2. Click **Update** on the payment window (<u>do not</u> add any payments yet). This will fully conclude the invoice and it will now be available in Trupanion's software.



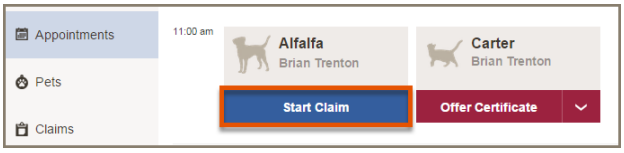
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Submitting a Pre-Approval

Now that your estimate or invoice is available in Trupanion's software, you can begin the pre-approval process.

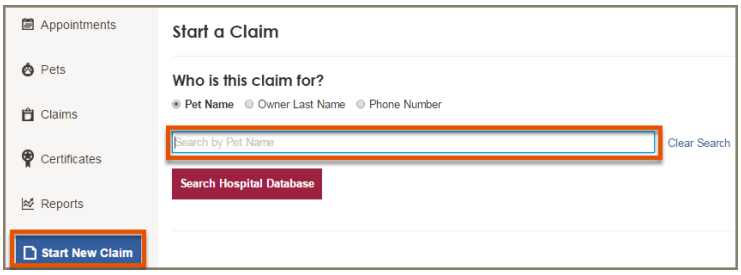
Start the Pre-Approval

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

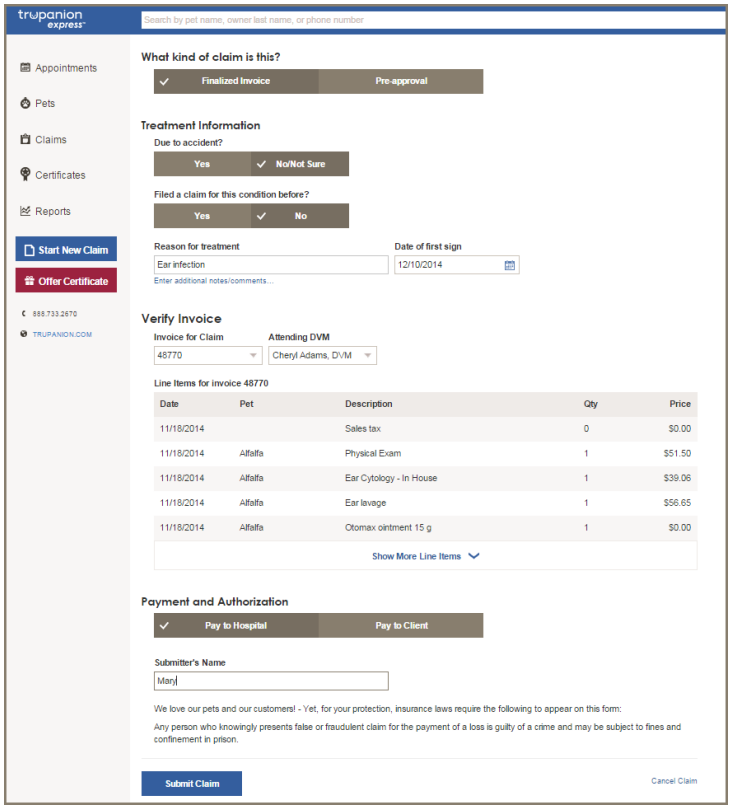


OR

If the pet was not on the appointment schedule for today, click the **Start New Claim Express Link** from the Main Menu and search for the pet.



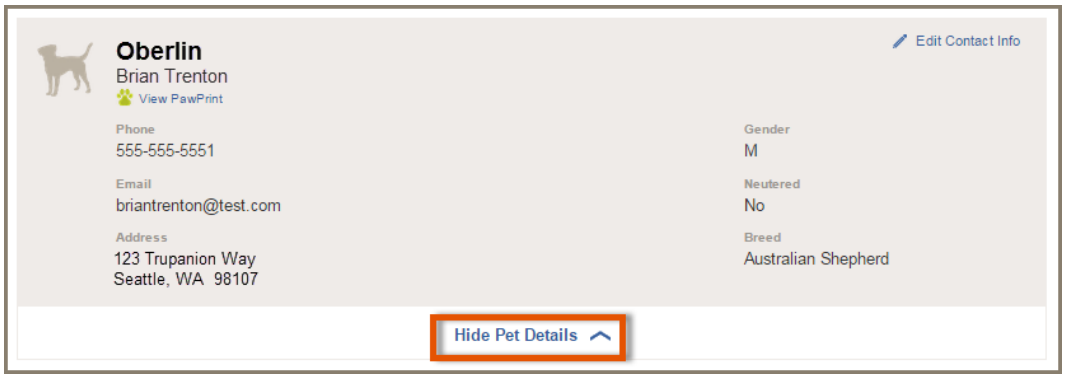
You will be presented with the claim/pre-approval form.



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Pet Details

Generally the pet details will be hidden. You have the ability to Show and Hide the pet details as needed.

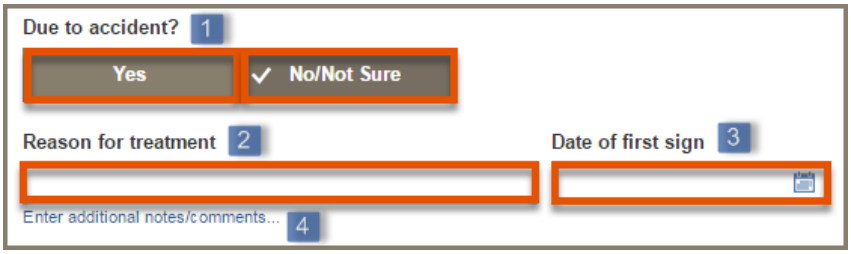


Complete the Pre-Approval

1. Select **Pre-approval** as the type of claim.



2. If the pre-approval 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 pre-approval visit. Adding more detail can help expedite pre-approval processing.

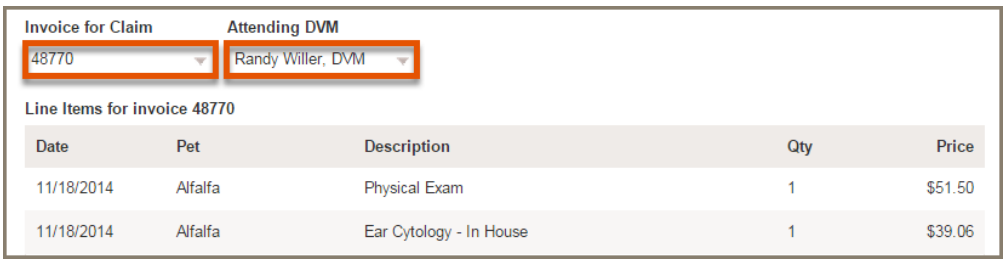


3. If a claim has previously been filed for the condition, click **Yes** and you will have the ability to select the previous claim. This will pre-fill the Reason for treatment and Date of first sign. Click **Enter additional notes/comments** to add more detail about the pre-approval visit. Note that this option will not be available if the pet has not had any prior claims at your hospital.

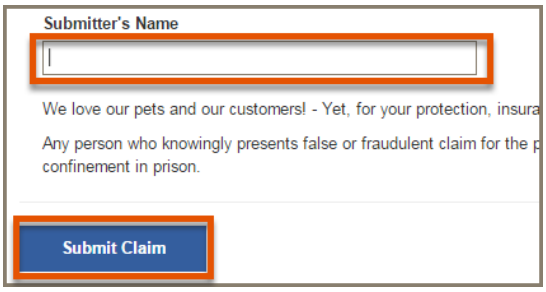


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4. Confirm the correct estimate/invoice and Attending DVM are selected, or select the correct information from the drop downs lists. The most recent estimate/invoice will be selected by default.

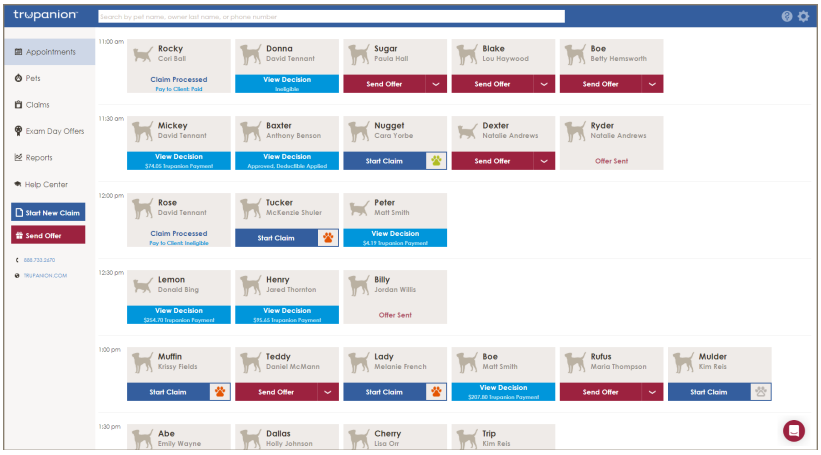


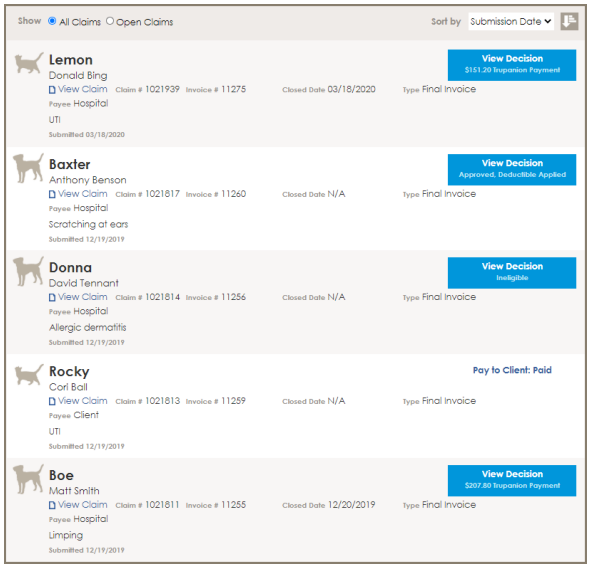
5. Type your name in the Submitter's Name and click **Submit Claim**.



Checking Pre-Approval Status

Pre-approval status can be viewed from the pet tile on the **Appointments** page or from the **Claims** page directly. These pages will auto-refresh once the information has changed.





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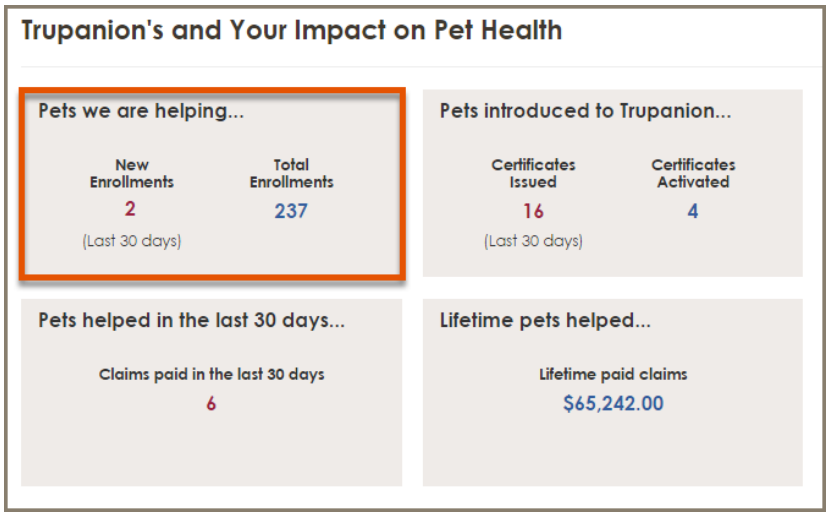
Dashboard and Reporting

Trupanion's software provides at-a-glance information on how Trupanion is impacting your hospital and the pets you care for, as well as readily available reports that assist you in reconciling your Trupanion payments. All of this information can be found under **Reports** in the Main Menu.

Dashboard

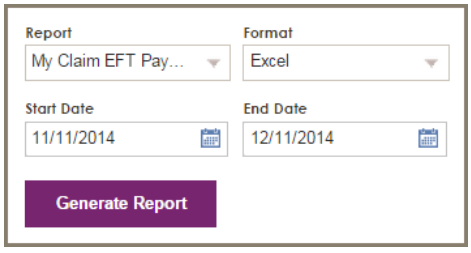
The dashboard gives you an overview of how Trupanion is impacting your hospital and your patients. The dashboard will show you at-a-glance details of:

- How many Trupanion enrollments your hospital has had in the last 30 days.
- How many total Trupanion enrollments your hospital has.
- How many Trupanion Exam Day Offers you have issued in the last 30 days.
- How many Trupanion Exam Day Offers have been activated by your pet owners.
- How many Trupanion claims have been paid in the last 30 days.
- The lifetime dollar amount of all paid claims from your hospital.



Reports

We provide reports that assist you in reconciling your Trupanion payments and understanding your Exam Day Offer activity. Each report can be customized by date, and you can determine the format you would like the report generated in. Possible report formats include PDF, Image, Excel, and Word. Simply choose your report, customize the format and date/date range, and click **Generate**.



The information below will help you understand what each report contains so that you can determine which are most pertinent to your hospital.

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My Finalized Paid Claims

This report allows you to see claims that have been processed and paid for a given date range. It includes:

- Pet Owner Name
- Pet Name
- Pet Breed
- Policy Number
- Claim Number
- Payment Recipient
- Invoice #
- Date the claim was received
- Date of the invoice
- Date the claim was closed
- Claimable Amount
- Deductible Applied
- Trupanion Payment Amount
- Payment Issued Date
- EFT Transaction #
- Check #

trupanion™
Medical insurance for your pet.

My Finalized Paid Claims
1/1/2013 to 12/11/2014

Trupanion Veterinary Hospital

Finalized Paid Claims

Pet Owner	Pet Name	Pet Breed	Policy Number	Claim Number	Payment Recipient	Invoice #	Date Recieved	Date Invoiced	Date Closed	Amount Claimable	Deductible Applied	Trupanion Pays	Payment Issued Date	EFT Transaction #	Check Number
Joe Camp	Mason	Bernese	TU000000001	866677	Hospital	262388	06-11-2014	06-11-2014	06-11-2014	$77.99	$0.00	$70.19	2014-06-12	56846	
Bob & Darlene Cook	Slinkey	Domestic Shorthair	TU000000002	867032	Hospital	262397	06-11-2014	06-11-2014	06-11-2014	$9.50	$0.00	$8.55	2014-06-12	56850	
Jim Dear	Charlie	Domestic Shorthair	TU000000003	858922	Hospital	262233	06-04-2014	06-04-2014	06-04-2014	$428.84	$250.00	$385.96	2014-06-05	55898	
Norman Diltz	Eddie	<Mixed Breed (Dog)>	TU000000004	858037	Hospital	262219	06-03-2014	06-03-2014	06-03-2014	$286.10	$300.00	$257.49	2014-06-04	55645	
Winifred Dundy	Neko	Domestic Longhair	TU000000005	855480	Hospital	262168	05-31-2014	05-31-2014	05-31-2014	$42.25	$0.00	$38.03	2014-06-02	55124	
Albert & Agnus Finkleman	Molly	American Cocker Spaniel	TU000000006	854275	Hospital	262115	05-29-2014	05-29-2014	05-29-2014	$230.94	$250.00	$207.85	2014-05-30	54858	
Delilah Hart	Sierra	Bernese Mountain Dog	TU000000007	854278	Hospital	262082	05-29-2014	05-28-2014	05-29-2014	$601.38	$400.00	$541.24	2014-05-30	54859	
Ralph McMann	Addison Montgomery	Great Dane	TU000000009	851427	Hospital	262044	05-27-2014	05-27-2014	05-27-2014	$323.05	$0.00	$290.75	2014-05-28	54595	
Theo Munster	Neko	Domestic Longhair	TU000000010	838960	Hospital	261796	05-14-2014	05-14-2014	05-14-2014	$148.27	$0.00	$133.44	2014-05-15	52763	
John Oliver	Buster	Golden Retriever	TU000000011	836898	Hospital	261766	05-13-2014	05-13-2014	05-13-2014	$155.37	$200.00	$139.83	2014-05-14	52514	
Juliette Pompeii	Addison Montgomery	Great Dane	TU000000012	833299	Hospital	261685	05-08-2014	05-08-2014	05-08-2014	$307.90	$0.00	$277.11	2014-05-09	51774	
John & Melissa Stewart	Char	German Shorthaired	TU000000013	831679	Hospital	261655	05-07-2014	05-07-2014	05-07-2014	$0.00	$56.00	$0.00	-	0	
Brian Trenton	Maxwell	Poodle-Toy	TU000000014	826611	Hospital	261539	05-02-2014	05-02-2014	05-02-2014	$91.40	$300.00	$82.26	2014-05-05	50778	
Scott Turner	Molly	<Mixed Breed (Dog)>	TU000000015	634674	Client	256071	09-25-2013	08-28-2013	09-27-2013	$23.15	$0.00	$20.84	-	0	
Jim Dear	Maya	Golden Retriever	TU000000016	587319	Client	255291	07-27-2013	07-27-2013	07-27-2013	$0.00	$62.51	$0.00	-	0	
Shirley Little	Otis	Miniature Schnauzer	TU000000017	581385	Hospital	255077	07-19-2013	07-19-2013	07-19-2013	$13.44	$0.00	$12.10	2013-07-22	17683	
John Oliver	Tiffy	Chihuahua	TU000000018	581076	Hospital	255050	07-18-2013	07-18-2013	07-18-2013	$600.39	$0.00	$540.35	2013-07-19	17549	
Brian Trenton	Primrose	Cavalier King Charles Spaniel	TU000000019	579959	Hospital	255026	07-17-2013	07-17-2013	07-17-2013	$341.80	$0.00	$307.62	2013-07-18	17436	
Delilah Hart	Penelope Louise	Perro de Presa Canario	TU000000020	577692	Hospital	254970	07-15-2013	07-15-2013	07-15-2013	$0.00	$39.97	$0.00	-	0	

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My Claim EFT Payments

This report allows you to see an aggregated view of EFT payments by date. By nature of the report, it only includes claims that were submitted as **Pay to Hospital**. This payment is commonly used by hospital accountants to ensure everything balances correctly. It includes:

- Transaction Date
- EFT #
- Transaction ID
- Invoice Date
- Invoice Number
- Date the claim was closed
- Claim Number
- Pet Name
- Pet Breed
- Pet Owner Name
- Policy Number
- Reason for Claim
- Total Claim Amount
- Trupanion Payment Amount

trupanion™ Medical insurance for your pet.

My Claim EFT Payments

Range : 1/1/2013 to 12/11/2014

Generated : 12/11/2014 2:49:22 PM

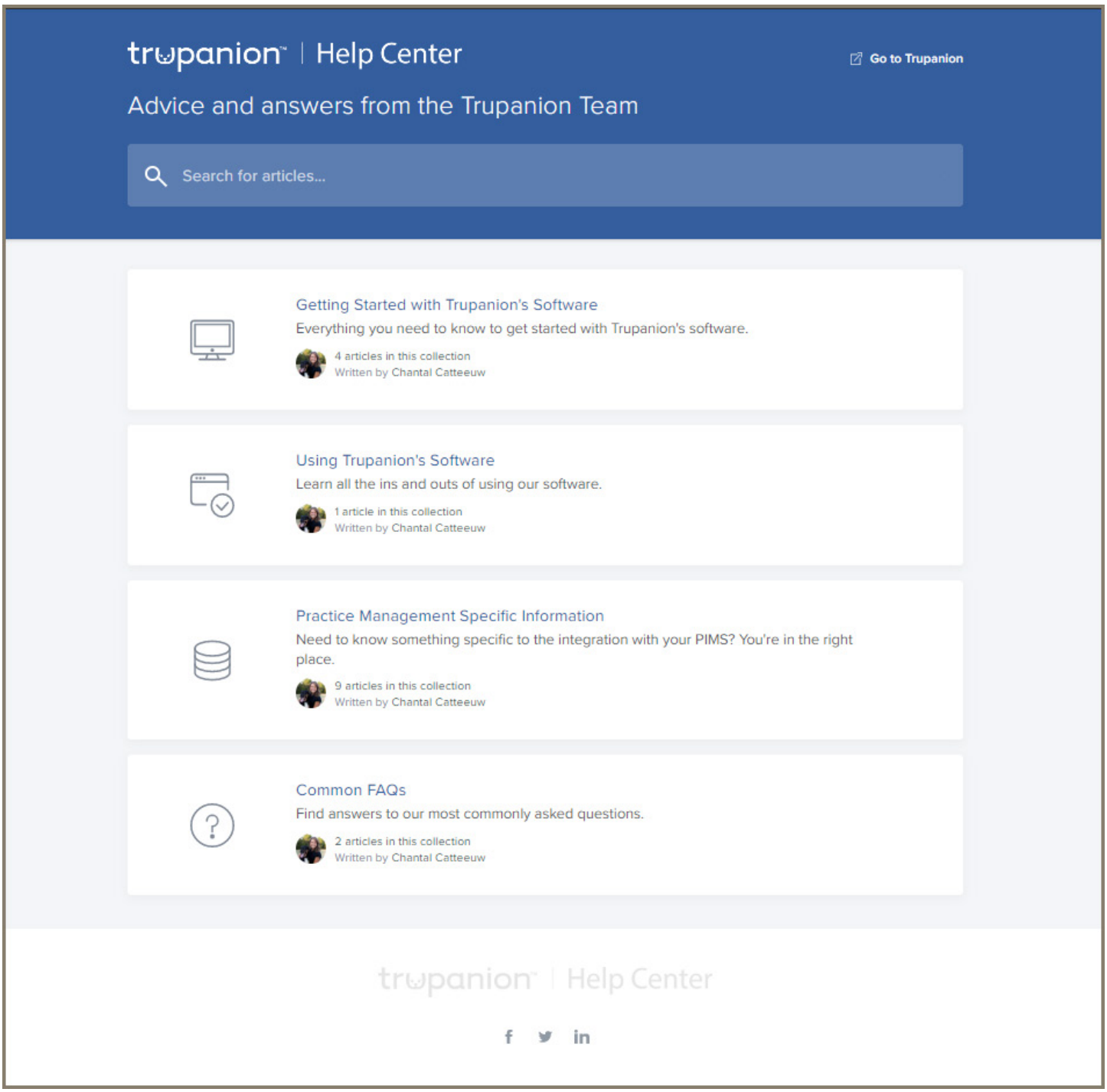
Trupanion Veterinary Hospital

Transaction Date	EFT	Transaction ID	Invoice Date	Invoice Numbers	Closed Date	Claim Number	Pet Name	Breed	Owner Name	Policy Number	Diagnosis	Total Claimed	Amount
2/13/2013	2285	7056	2/12/2013	251518	2/12/2013	475733	Misty	Labrador Retriever (Chocolate)	Bob & Darlene Cook	TU00000001	addison desease,	$151.84	$136.66
											Sub Total :	**$151.84**	**$136.66**
2/21/2013	2303	7497	2/20/2013	251693	2/20/2013	481087	Niobe	Boxer	Norman Diltz	TU00000003	Allergic Reaction, Bee Sting	$134.76	$56.26
											Sub Total :	**$134.76**	**$56.26**
2/22/2013	2305	7548	2/21/2013	251711	2/21/2013	482149	Gabby	Labrador Retriever (Black)	Ralph McMann	TU00000005	limping/lameness on left rear leg	$813.26	$441.91
											Sub Total :	**$813.26**	**$441.91**
2/27/2013	2315	7790	2/27/2013	251826	2/27/2013	485369	Otis	Miniature Schnauzer	John Oliver	TU00000007	Follow Up Lab work,	$65.72	$59.15
											Sub Total :	**$65.72**	**$59.15**
3/12/2013	2348	8607	3/11/2013	252122	3/11/2013	493084	Misty	Labrador Retriever (Chocolate)	Brian Trenton	TU00000009	Addisons Disease,	$181.95	$163.76
											Sub Total :	**$181.95**	**$163.76**
3/28/2013	2375	9619	3/27/2013	252465	3/27/2013	503769	Otis	Miniature Schnauzer	JoAnn Martinez	TU00000011	Bee sting,	$26.88	$12.10
											Sub Total :	**$26.88**	**$12.10**
4/10/2013	2404	10377	4/9/2013	252717	4/9/2013	511804	Otis	Miniature Schnauzer	Scott Turner	TU00000013	Bee sting,	$26.88	$12.10
		10380	4/9/2013	252724	4/9/2013	512183	Misty	Labrador Retriever (Chocolate)	Shirley Little	TU00000014	Addisons Disease,	$156.43	$140.79
											Sub Total :	**$183.31**	**$152.89**
4/18/2013	2422	10879	4/17/2013	252921	4/17/2013	517869	Slinkey	Domestic Shorthair	Ralph McMann	TU00000016	Urinating outside of litterbox	$552.87	$497.58
											Sub Total :	**$552.87**	**$497.58**
4/29/2013	2444	11476	4/26/2013	253117	4/26/2013	524017	Mason	Bernese Mountain Dog	Brian Trenton	TU00000018	SKIN, ALLERGIES	$229.97	$103.48
											Sub Total :	**$229.97**	**$103.48**
5/1/2013	2448	11629	4/30/2013	253194	4/30/2013	525745	Otis	Miniature Schnauzer	John Oliver	TU00000020	Bee sting,	$53.76	$24.19
											Sub Total :	**$53.76**	**$24.19**

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Help Center

Since it is important that you have access to the information you need, when you need it, Trupanion has a host of on-demand training, onboarding, and support materials available to you. From the **Help Center** option in the Main Menu, you'll have access to a variety of resources that will help you get started with Trupanion's software, answer commonly asked questions, or provide a quick refresher on specific functionality.



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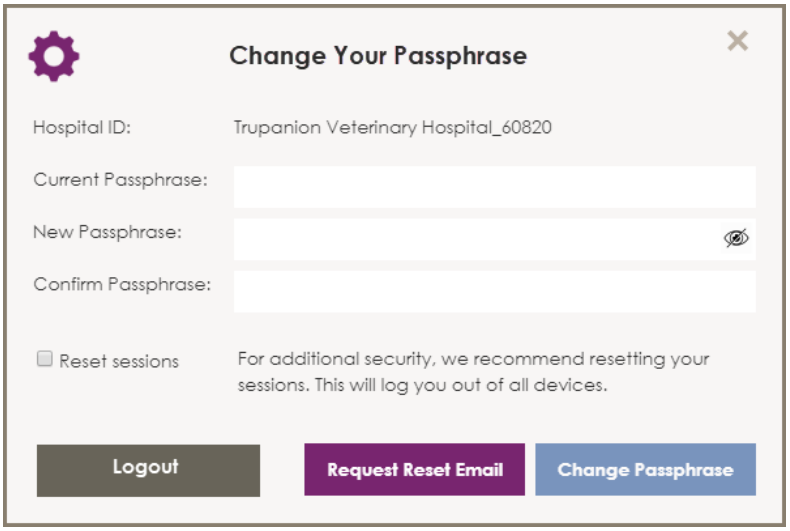
Resetting Your Passphrase

Change Your Passphrase

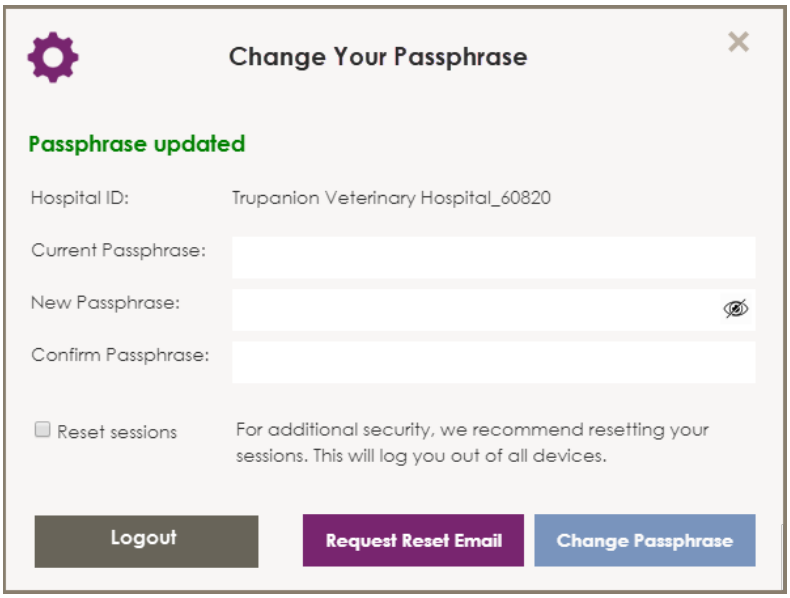
If you're already logged into the software and would like to change your passphrase, you can do this from the Settings screen.



1. Enter your current passphrase then enter and confirm your new passphrase. Keep in mind that passphrases must now be at least six characters and include one upper case letter, one lower case letter, and a number. We recommend resetting all of your logged in sessions for additional security. To do this, you'll check the **Reset sessions** checkbox. Click the **Change Passphrase** button to complete. If the Change Passphrase button is not active, make sure you have completed all 3 passphrase fields, your new passphrase meets the minimum requirements, and your new and confirm fields match.

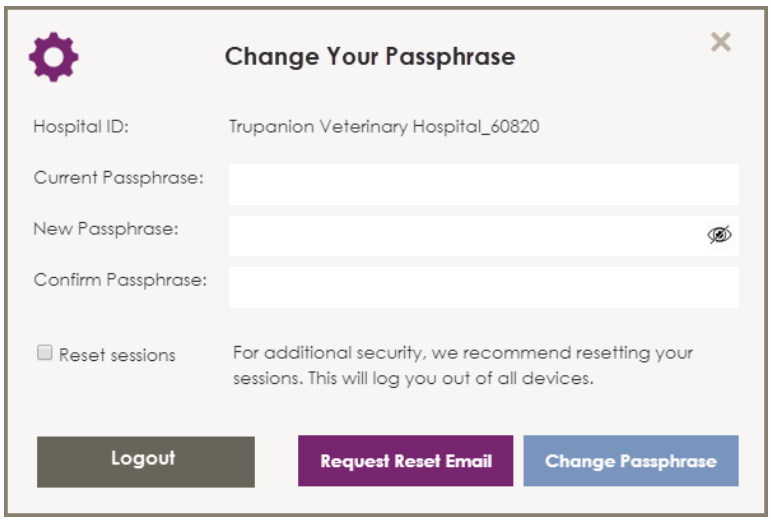


2. You will receive a confirmation that your passphrase has been updated.

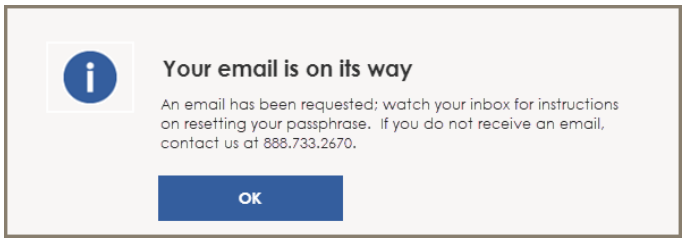


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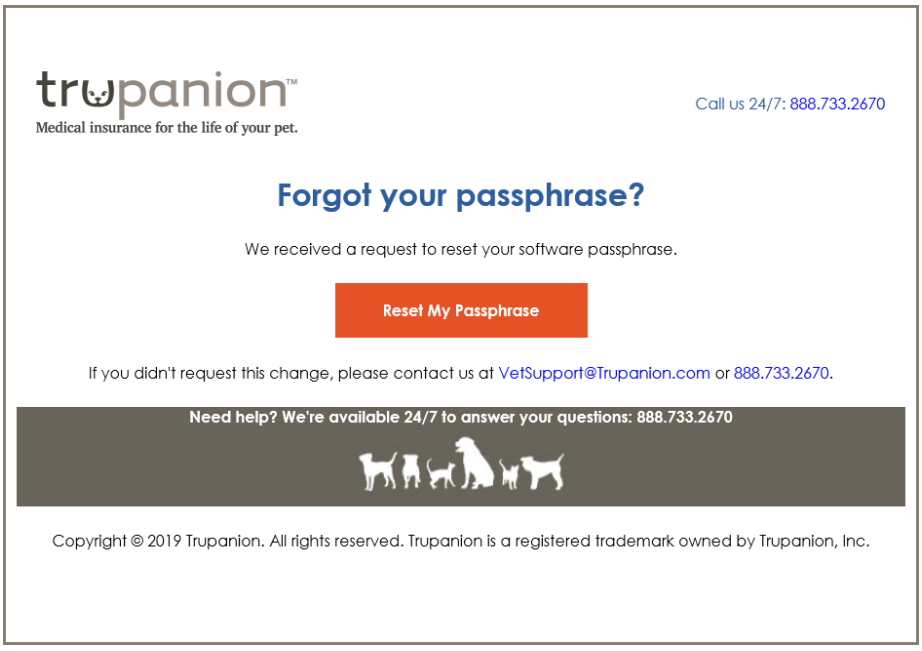
3. If you've forgotten your current passphrase, click the **Request Reset Email** button to receive an email that will allow you to reset your passphrase.



4. If you don't receive an email, give us a call at 888.733.2670 for assistance.

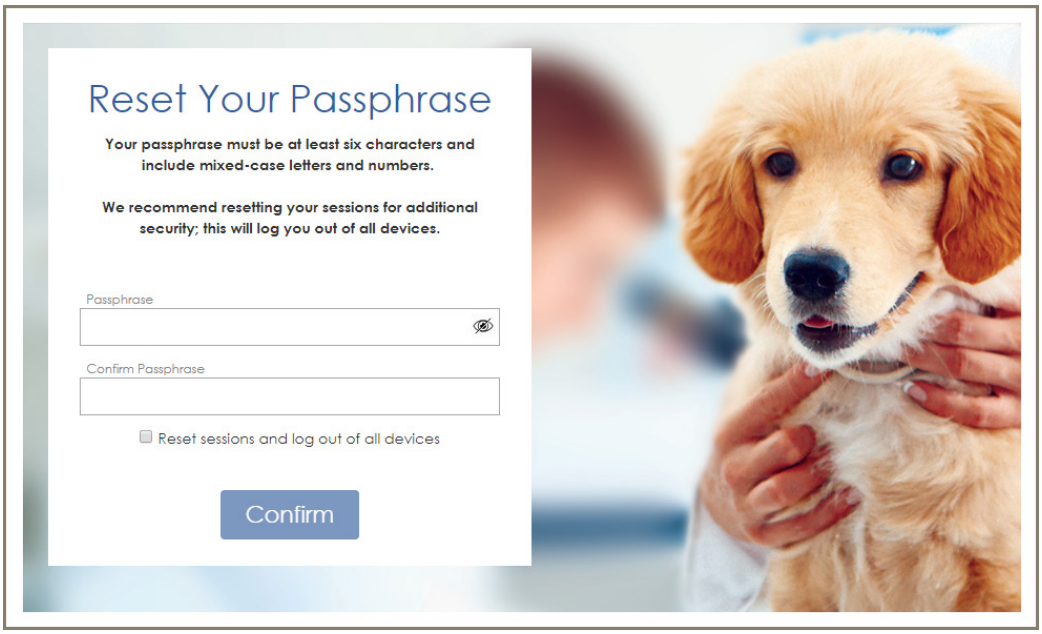


5. Click the **Reset Passphrase** button in your email.



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6. Enter and confirm your new passphrase. Keep in mind that passphrases must now be at least six characters and include one upper case letter, one lower case letter, and a number. We recommend resetting all of your logged in sessions for additional security. To do this, you'll check the **Reset sessions and logout of all devices** checkbox. Click the **Confirm** button to complete.

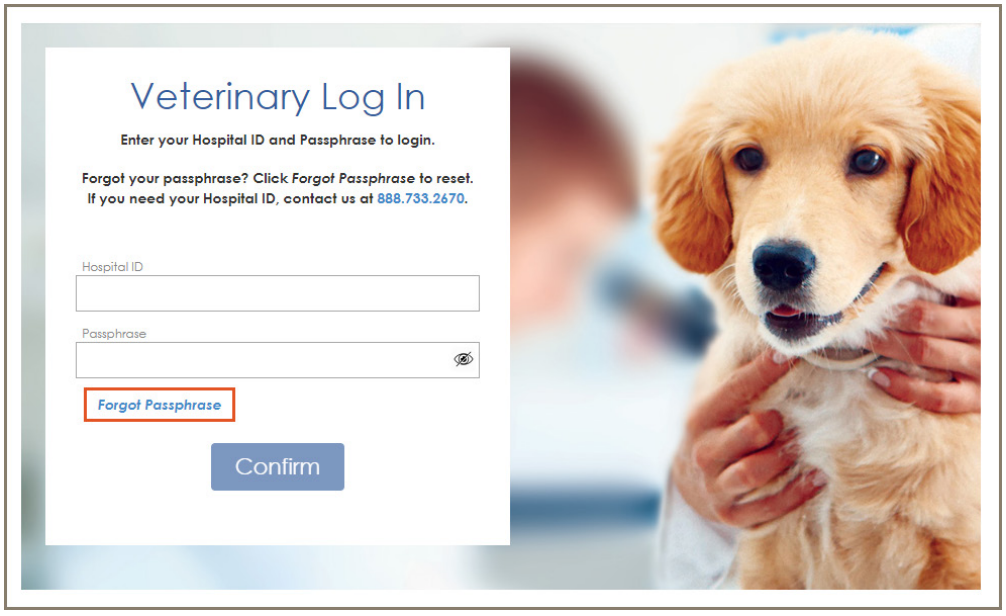


7. Your Forgot Passphrase email link is only good for 1 hour. If you click on it and receive an expired link message, click the **Set Passphrase** button to request a new email link.

Forgot Passphrase

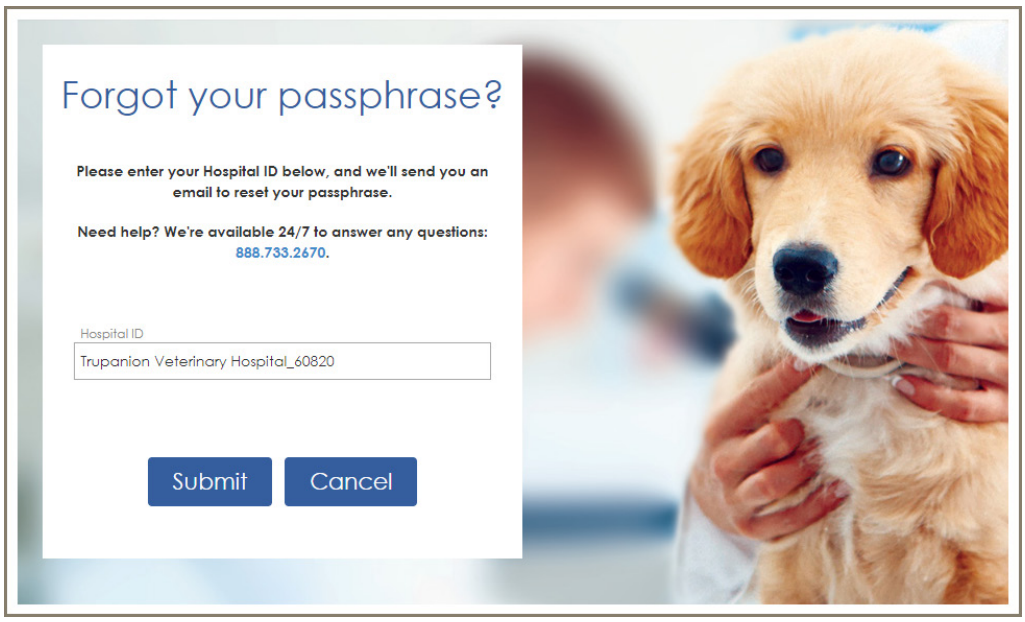
Having trouble remembering your login credentials? We've made it easy to reset your passphrase if you've forgotten it.

1. Start by clicking **Forgot Passphrase** from the Veterinary Log In page.

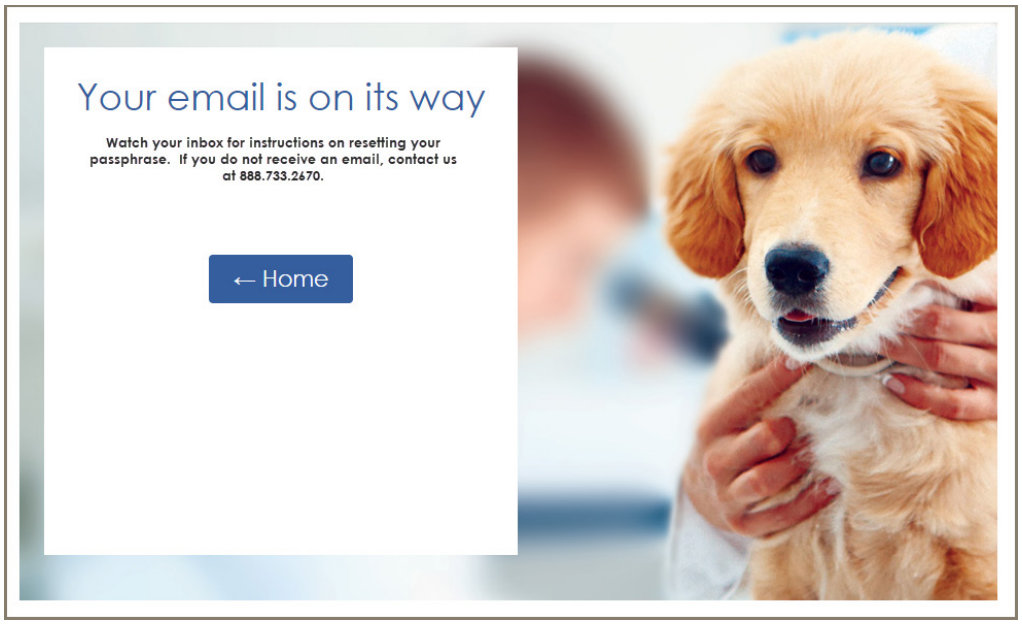


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2. Enter your Hospital ID and click **Submit**. Forgot your Hospital ID? Just give us a call at 888.733.2670 and we'll assist.

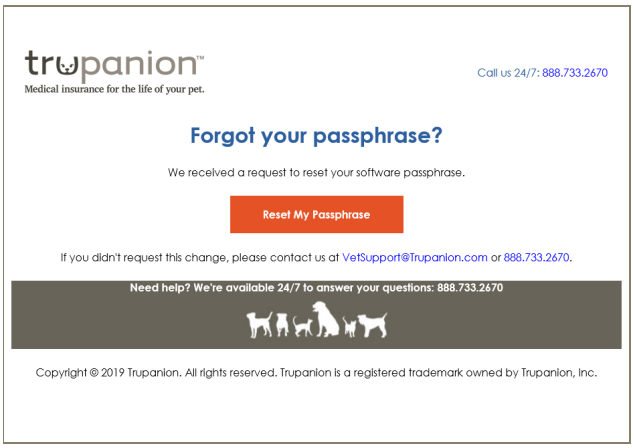


3. We'll send you an email that will allow you to reset your passphrase. If you don't receive an email, give us a call at 888.733.2670 for assistance.

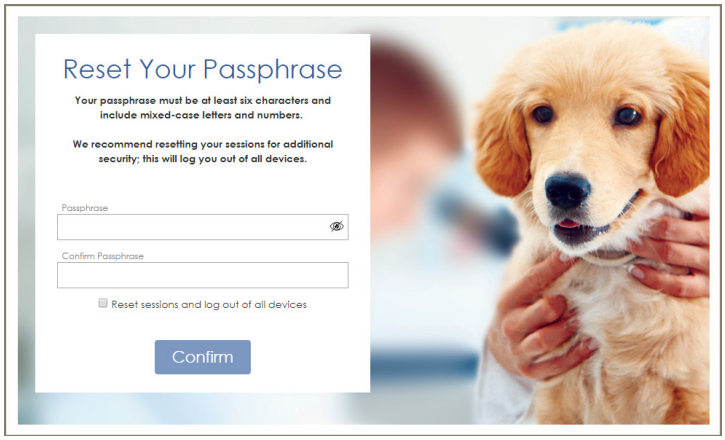


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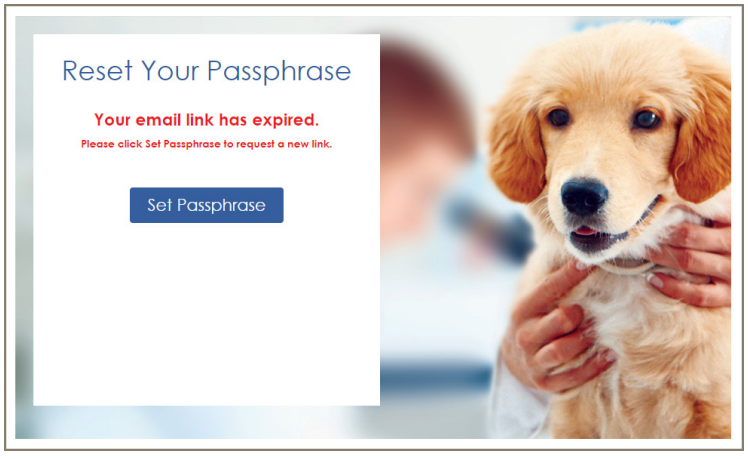
4. Click the **Reset Passphrase** button in your email.



5. Enter and confirm your new passphrase. Keep in mind that passphrases must now be at least six characters and include one upper case letter, one lower case letter, and a number. We recommend resetting all of your logged in sessions for additional security. To do this, you'll check the **Reset sessions and logout of all devices** checkbox. Click the **Confirm** button to complete.



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Support Tools and Resources

In order to provide you with the assistance you need when you need it, Trupanion offers a team of Support Specialists, dedicated Account Managers, as well as self-service support tools that are readily available to you.

Support Resources

Account Managers

Your dedicated Account Manager will ensure you get up and running with the software as seamlessly as possible. They'll celebrate successes with you, and will assist you in optimizing your processes with the software.

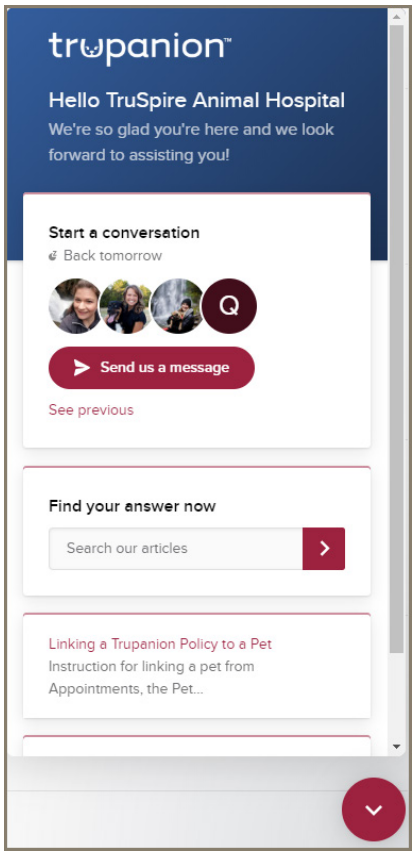
Vet Support

The Vet Support Team is a team of specialists dedicated to supporting veterinary hospitals. They have extensive knowledge in both veterinary medicine and Trupanion policy details and are here to answer any questions you may have.

Live Chat: Use the live chat icon in the lower right corner of the software
Email: VetSupport@trupanion.com
Phone: 888-733-2670

Live Chat and Messaging

Live chat is a quick and easy way to reach our teams at the moment you need them. It also gives our teams the ability to connect with you via an outbound chat, allowing us to stay connected and provide you with relevant and timely Trupanion information. Access live chat from the icon in the lower right corner of the software.

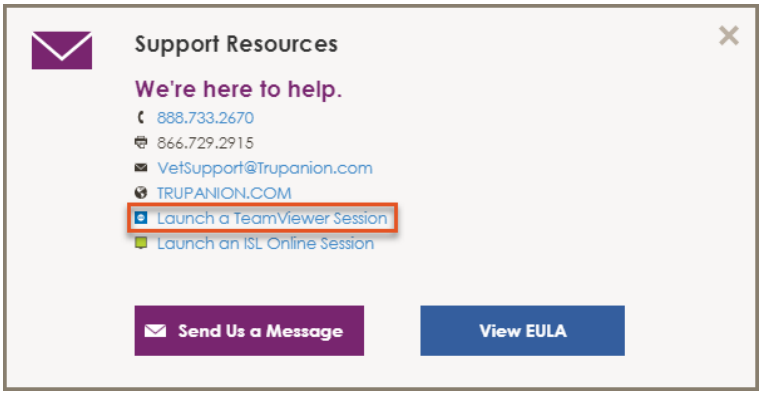


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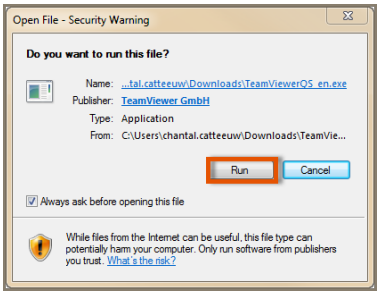
TeamViewer

Visual and interactive support for Trupanion's software is facilitated by TeamViewer. This application allows the Vet Support Team to establish a real-time connection to your system in order to provide live assistance.

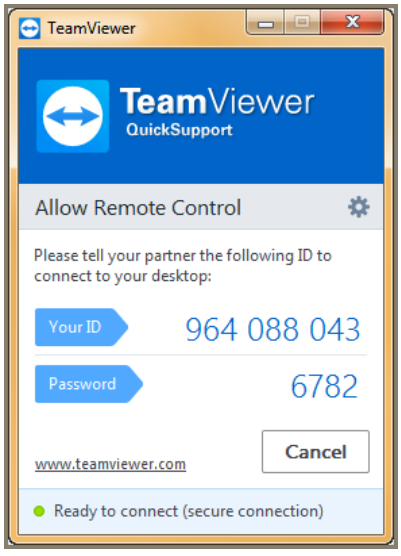
1. When directed to do so, access the link to **Launch a TeamViewer Session** from the Support Resources page.



2. Once TeamViewer has downloaded, click to Run it.



3. The TeamViewer screen will show you an ID and Password. Provide this information to your support specialist.



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