

SOFTWARE UPDATE NOTES



6.1

You should read this document thoroughly before updating to the latest version 6.1 of VETLINKPRO. While there are many changes within the update, the major feature-changes and feature-additions are described here in some detail. For further assistance, and for further minor updates since the publication of this document, please refer to the online help system under the **Help / What's New...** menu.

These notes are VERY IMPORTANT and should be handed out to every member of your team so that they can become more efficient at using VETLINKPRO. We commonly find that many users in a clinic are unaware that the system can be used in a more efficient manner, either due to a lack of training, or simply because the feature-set has been improved in new versions but they have not been informed!

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Wellness Plans

A new feature for Wellness or Healthcare Plans has been added into VetlinkPro. Pet plans are preventive healthcare plans for pets which will allow a client an easy and affordable way of managing their pet's health. Health plans are designed to cover most of the pet's healthcare across a period of one year. Health plans cover a pet's regular vaccinations, tests, free visits and offer discounts on selected products and services. Clients have the option to pay upfront as a lump sum or in more affordable monthly instalments. See Appendix 1 – Wellness Plans for more information.

Recurring Invoices

Recurring invoices can be created for transactions that occur regularly every week/month/year. The Recurring invoices functions will then help you manage those as they become due. This is commonly used for managing things like parasite control. For example, you can create a recurring invoice for parasite control for a client that re-occurs every 3 months. You can then generate a list of parasite control recurring invoices for the month so you can see what orders need to be fulfilled. See Appendix 2 – Recurring Invoices for more information.

Reverse Bill from Action Menu

The reverse bill functionality is now available from the action's menu of a finished bill. To use just open the finished bill and go to **Actions -> Refund Bill**.

The screenshot shows the 'Tax Receipt for Venu Gopal (# 1/1047) Branch Demo Till# 1' window. It displays client information, a pet's details (Peggy, Afghan Hound), and a bill table. A red arrow points from the 'Sub Total for Peggy including GST' field to the 'Refund Bill' option in the 'Actions' menu.

#	Staff	Type	Qty	Name	RRP	Discount	Price	Script	Notes	Batch	Expiry Dt
1	GS	\		For Peggy							
2	GS		1	Vacutainer & Needle	\$1.30		\$1.30				
3	GS	^	1	Vacutainer All	\$0.76		\$0.76				
4	GS	^	1	Vacutainer Needles	\$0.54		\$0.54				
5	GS	S	1	Consult	\$115.00		\$115.00				

Sub Total for Peggy including GST: \$116.30

Account Status: ClnUpdtd 10/08/2021 3:55:25 pm
Inventory Status: StkUpdtd 10/08/2021 3:55:25 pm

Date: 10/08/2021, TypeS: Credit Card, Amount: \$116.30, Reference: [blank]

Sub Total: GST, Total, Due

Actions menu options: Change Payment, Edit Bill, Refund Bill, Email this invoice, History Browser Shift+F8, Make Insurance Claim, Clone Bill, Clone Bill And History, View Activity Log

Make Payment from Action Menu

You can now make a payment from the action's menu on any outstanding bill. Just open the bill click **Actions -> Make Payment**.

The screenshot shows a 'Tax Invoice for Jacinda Ardern (# 1/1091) Branch V12Test Till# 1'. The invoice details include the client's name, address, and a bill for Fluffy (# 1/1085). The 'Actions' menu is open, and 'Make Payment' is highlighted with a red arrow.

#	Staff	Type	Qty	Name	RRP	Discount	Price	Script	Notes	Batch	Expiry Dt	Bonus Pts	Item Scripts	Action_Ans	PmtPrc_On_Bill	Incen
1	JR	V		For Fluffy								0	0		Y	
2	JR	S	1	1>Consult	\$65.00	\$6.50	\$58.50					0	0		Y	

Sub Total for Fluffy including GST: \$58.500

Account Status: ClnUpdtd 1/10/2021 11:09:59 am

Inventory Status: StkUpdtd 1/10/2021

Actions menu options:

- Change Payment
- Edit Bill
- Refund Bill
- Email this invoice
- History Browser Shift+F8
- Make Insurance Claim
- Make Payment**
- Clone Bill
- Clone Bill And History
- View Activity Log

Client screen

Refund Bill and **Reverse Bill** are now available under the **Actions** menu in the client record.

The screenshot shows the 'Jacinda Ardern (Client # 1/1091)' window. The 'Actions' menu is open, and 'Refund Bill' and 'Reverse Bill' are highlighted with a red arrow.

Client Details:

- Title / Gnd: Male
- First Name: Jacinda
- Last Name: Ardern
- Known As:
- Co Name:
- Date: / / (dd/mm/yy)
- Status: Active
- Work: 0
- Home: 0
- Fax: 0
- Mobile: 021 2345678
- Phone 1: 0
- Phone 2: 0
- Phone 3: 0
- Email:
- Web:

Address:

- St Num: 10
- Street: Anzac Avenue
- City: Auckland
- Post Code: 1010
- Distance: km
- Care of:
- Note:

Financial Summary:

Plan	Ins	Num	Name	Type	Breed
1/1085			Fluffy	Cat	American
1/1079			Fred	Cat	American

Financial Summary Table:

3 Mth +	2 Mth	1 Mth	Current	Total	Open	Batched	Total
\$0.00	\$0.00	\$50.00	\$109.00	\$159.00	\$85.80	\$0.00	\$244.80

Actions menu options:

- Barcodes F6
- View Reminders F7
- Patient F8
- Notes Ctrl+N
- Standing Appointments Ctrl+S
- Make a Quote Ctrl+Q
- Make an Estimate Ctrl+E
- Make Bill Ctrl+B
- Batched Bills Ctrl+Alt+B
- Future Bills Ctrl+Alt+F
- Make a Payment Ctrl+Alt+P
- Refund Bill Ctrl+R
- Reverse Bill Ctrl+Alt+R
- Recurring Invoice Shift+Ctrl+C
- Make Appointment Ctrl+A
- View Future Appointment
- Yukti System Ctrl+Y
- SMS Conversation
- Clear No-Show
- Loyalty
- Edit Client in Tablet
- Statement
- View Activity Log**
- Anonymise

Email (Printer Prompt)

For clinics where the "Prompt for Printer Selection" is enabled, the printer selection will also now appear when emailing for the first time, as the printer is needed to create the PDF.

Verifone Vx820 IP Support

The Verifone Vx820 can now be configured with IP address as well as by serial cable. Integration is only available in NZ at this stage.

Tax Audit Report

A new Tax Audit report has been added under [Reports -> Reports/Lists -> Misc -> Tax Audit Report](#). It is useful for countries with multiple tax rates. The report will group transaction under each tax rate. Each tax group can show each transaction or you can summarise by category. The report can also be done for either debtors, creditors or both.


GST Audit Report						
15.00% GST on Sales / Income						
Date	Trn Ref	Item Ref	Item Description	Sub Total	Gross	Tax
C/AANTIBIOT				167.76	192.96	25.20
C/AFEES				57.99	66.69	8.70
C/AFLEAS				160.17	184.20	24.03
C/AFOOD				149.16	171.54	22.38
CAT				391.32	450.00	58.68
Default				53.57	61.60	8.03
HORSE				1,424.36	1,638.00	213.64
In House Use				150.64	173.22	22.58
L/ADISIN				92.88	106.80	13.92
TEST				11,777.15	13,543.74	1,766.59
TEST2				147.90	170.00	22.10
Totals for 15.00% GST on Sales / Income				14,572.90	16,758.75	2,185.85

Purchase Rewards Prompt at Sale

A prompt to alert staff that a client is already able to redeem a product, will now pop up as soon as an eligible item is added to the bill. Rather than waiting until the payment screen.

Gribbles (NZ) / NZVP / Idexx (NZ) PDF Lab Reports

External Lab results from Gribbles, NZVP / Idexx (NZ) can now be received as PDF and/or text results. Please contact the helpdesk if you would like help configuring either of these.



Gribbles Veterinary Pathology
840 Tremaine Ave
Palmerston North
Ph: 06 356 7100

Case No: PN21T0301 - Biochemistry - Issue 1

Case No: PN21T0301

Report To: Jo Archibald Testing
840 Tremaine Ave

PALMERSTON NORTH 4414

Species: Bovine
Breed: Dairy

Age: 0 UNKNOWN
Sex: Female

Submitted By: Jo Archibald Testing
Submitter ref: L123
Owner: Test Owner

Date Sent: 09/08/2021 14:53
Date Received: 09/08/2021 14:53
Date Tested: 09/08/2021 14:54

Animal/Herd: BOVINE

All client, owner and animal details supplied by the submitter.

Tests Requested:
1 x EDTA - Fibrinogen
1 x Serum - Johnes ELISA
1 x Serum - Sodium
1 x Serum - PMSG

Chemistry

	COW	Units	Ref Interval
Sodium	138	mmol/L	136 - 146
Phosphate	2.30	mmol/L	1.30 - 3.30

TESTING VETLINK LABELLED PDFS

Test methodology references are available on request.
(Note: Results apply only to samples received, on an as found basis. Reference intervals are standard Gribbles Veterinary reference intervals.)


Signed Jo Archibald

Report Date: 11/08/2021 08:22 **Final**

Gribbles Veterinary Pathology make every effort to collect, analyse and report the results of tests accurately and promptly but accepts no responsibility for any factors which influence the results that are beyond our control. This report should not be reproduced except in full. All sample identification supplied by the submitter.

Client SMS Templates

Client SMS templates can now be configured in [Options | Pick list Setup | Client | Custom SMS Template](#), these can be used in Client Conversation window or from the Debtors Management screen to send SMS for overdue accounts. Previously Diary custom SMS templates had accidentally been available in the client conversation window but weren't compatible with all mail merge variable so the new client SMS templates were added.

PetSure Insurance Integration (AUS Only)



The PetSure integration allows clinics to send claims directly to the insurance provider. Staff can pick the bills, clinical notes and attachments that relate to the claim and send them off in a simple process. GapOnly™ is currently in development and will be coming soon. For more information on the PetSure Integration see appendix 3 at the end of this document.

Record Patient Insurance Details

Patient Insurance details can be added from the patient record. To add the details;

1. Open the patient record
2. Click the Insurance icon on the right-hand side of the record or go to **Actions -> Insurance -> Register**.
3. Select the insurance provider from the list or type in a new provider name if it doesn't exist already.
4. Enter the **policy number**
5. Enter other details as required.
6. **Accept** the details to save to the patient.
7. The **Umbrella icon** will turn **green** to indicate the animal is insured.
8. On the billing/history form the green umbrella will show to indicate the patient has insurance.

Fluffy (Patient# 1/1110)

1: Personal 2: More 3: History 4: Graphs 5: Doc Mgr 6: Handouts

Name: Fluffy Age (Y/M): DOB: Type: Cat De-sexed: Unknown on Breed: Deceased: No on X with: Colour: Size: Small Gender: Unknown Prodn: No Status: Active Code: Chip Id: First Vst: Last Vst: Herd Siz: 1 Weight: Ideal: Last: on

Owner: Scott Morrison (1/1116) Chg To: Scott Morrison (1/1116) Location: Scott Morrison (1/1116)

Due Reminders Vaccinations

Life Stage: Unknown Since: Pls Updt Breed

Hst_Date Summary Stf Template Bil_Num Lab_V

Register Insurance Policy

Service Provider: Non Integrated Pet Name: Fluffy Customer Name: Scott Morrison Email: Phone 1: Phone 2: Insurance Provider: Policy Number: Status: Not Validated

✓ F12: Accept ✗ ESC: Cancel

Tax Receipt for Scott Morrison (# 1/1116)

Scott Morrison 4 Anzac Avenue Auckland CBD Auckland 1010 ** NEW CLIENT **

Fluffy (# 1/1110), Cat, Unknown [??] ** FIRST VISIT **

Date: 18/06/2021 Num: # 1/1560 Referral: Rqst Staff:

All Add Fluffy

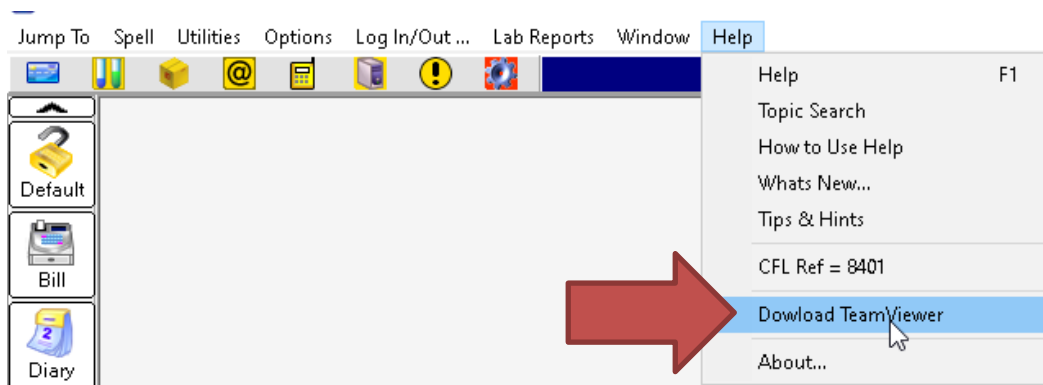
1: Bill 2: History

#	Staff	Type	Qty	Name	RRP	Discount	Price	Script	Notes
1	DC			For Fluffy					

Account Message Retail

Team Viewer Download

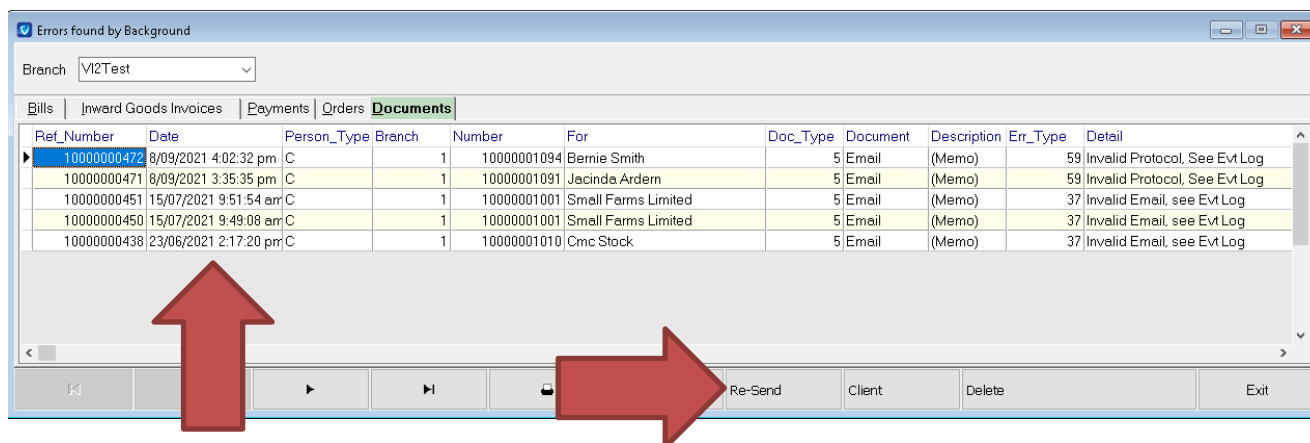
A link to download TeamViewer has been added under Help menu for easy access.



Error Information Screen - Resend

When looking at Emails/SMS errors in the Error Information screen;

- **Date:** The Date has been moved to the start of the grid so users can easily see when the document was created.
- **Resend:** The Clear Error button has been renamed to Resend to better describe the buttons functions. Selecting a email/sms error and clicking resend will try to resend the email/sms to the client.



VetCheck Integration



VetlinkPRO's VetCheck integration allows users to quickly prefill forms, questionnaires and information sheets in VetCheck with client and patient details from VetlinkPRO and then quickly share/email those to clients. A link to the shared document then automatically gets saved back to the patient's clinical history or Document Manager depending on where it was requested from.



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END OF UPDATE NOTES

Appendix 1 – Wellness Plans

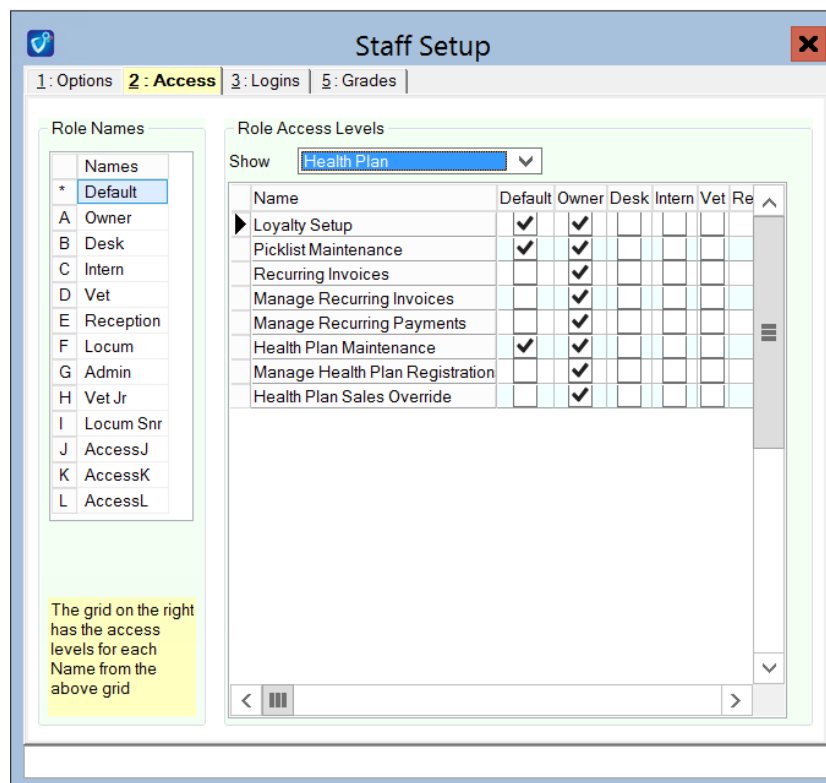
Overview

Pet plans are preventive healthcare plans for pets which will allow a client an easy and affordable way of managing their pet's health. Health plans are designed to cover most of the pet's healthcare across a period of one year. Health plans cover a pet's regular vaccinations, tests, free visits and offer discounts on selected products and services. Clients have the option to pay upfront as a lump sum or in more affordable monthly instalments.

Wellness Plan Setup

Security Levels

1. **Loyalty Setup:** User access control required for creating/altering any of the loyalty programs in [Options | Picklists | Loyalty](#) such as Bonus Points, Purchase Rewards, Client and Patient Discount Scheme and Health Plans
2. **Picklist Maintenance:** User access control required for altering any of the functionality under Picklist Setup
3. **Recurring Invoices:** This controls the ability to create recurring invoices for things like parasite control.
4. **Manage Recurring Invoices:** Controls the ability to manage the recurring invoices by posting/finalising them when they become due.
5. **Manage Recurring Payments:** Not Implemented
6. **Health Plan Maintenance:** User access control for creating health plan template in [Options | Picklists | Loyalty | Health Plans](#).
7. **Manage Health Plan Registration:** User access control required for registration, creation and termination of Health Plans.
8. **Health Plan Sales Override:** User access required to override the Held status of a plan at billing so client may take advantage of the benefit of a held plan.

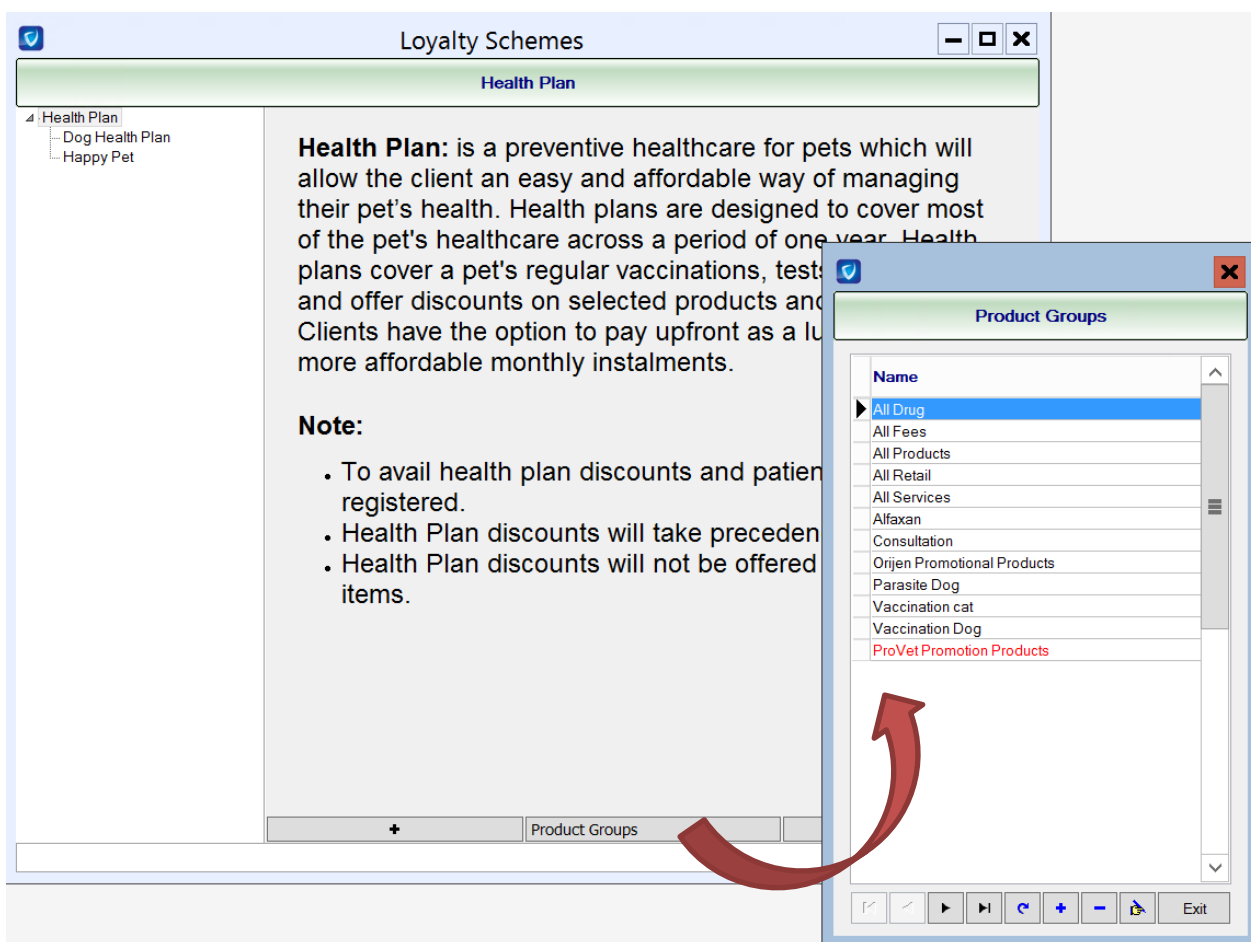


Creating a Wellness Plan

To create a new Wellness Plan follow the steps below

1. Options -> Picklists Setup -> Loyalty -> Health Plan

2. The first thing that you will need to set up will be the Product Groups. This can be accessed by clicking on the **Product Groups** button on the bottom of the Wellness Plans window.
 - a. There are five Product Groups that are already set up for you. These are; All Drugs, All Fees, All Products, All Retail, and All Services. By default, all products that are in your database will be assigned to these Product Groups based on their class. New products will get automatically added as well.
 - b. To add your own Product Groups, then simply click on the **+** button on the bottom of the Product Groups window. Start by giving the group a Name then click on the **+** button to start adding products for that group. For example, you may give a discount on Flea products in your wellness plan. Therefore, you would create a flea products group and add all your flea products to it. Then on Wellness plan you can add the Flea Products group and apply a 10% discount to it.
 - c. Close the Product Group window when done.
 - d. **Note:** that Product Groups are shared between Purchase Rewards, Client Discount, and Patient Discount.



3. Click the **+** Button to create new health plan
4. Enter the Wellness Plan Details
 - a. **Plan Name:** e.g., Puppy Wellness Plan
 - b. **Status:** Active
 - c. **Plan Term:** 12 months (this is not configurable)
 - d. **Auto Renew:** Days before the Scheme expiry to renew the plan
 - e. **Stop Manual Price / Discount Change:** Prices / Discounts cannot be overwritten by staff (this is not configurable)
 - f. **Stop Bonus Point:** Plan items will not accrue bonus points (this is not configurable)
 - g. **Registered With:** Only VetlinkPRO created plans are available.
 - h. **Setup Forms:** You can create the registration forms here that detail plan terms and conditions, and /or benefits of the plan.
 - i. **Grace Period:** If a plan instalment has not been paid, this option sets a limit on how many days past its due date can the client still get the plan benefits.
 - j. **Registration Fee:** One-off initial payment to register for the wellness plan.
 - k. **Term Payment (One-off):** Total payment if client pays for entire plan up front.
 - l. **Monthly Payment:** Monthly fee client required to pay for the plan.
 - m. **Payment Monthly:** Auto-calculated from the monthly payment.
 - n. **Weekly Payment:** Weekly fee client required to pay for the plan.
 - o. **Payment Weekly:** Auto-calculated from the monthly payment.
5. **Enter Items available on plan**
 - a. We recommend putting items into product group. Once a plan has started it cannot be changed. However, you can still add and remove items from product groups.
 - b. To add a discount or free items to the wellness plan
 - i. Click the **+Product Group** or **+Product button** -> select the group/product you wish to add and it will be added to the plan.
 - ii. In the Disc column add the discount you want to apply. If you wish to give free items then put a 100% discount.
 - iii. In the Limit field enter the limit the client can purchase, e.g., 2 free consults.
 - iv. In the Per Trn field, you can limit the number of items a client can purchase in 1 visit. E.g., to prevent someone purchasing all their flea products on day 1 and then cancelling or not paying for the rest of the plan.

Loyalty Schemes

Health Plan

Health Plan

- Dog Health Plan
- Happy Pet
- Copy of Dog Health Plan

Plan Name: Senior Dog Health Plan

Status: Inactive

Plan Term (Months): 12

Auto Renew (Days): 0

Stop Manual Price / Discount change: Yes

Stop Bonus Point: Yes

Registered With: In-House

Grace Period (Days): 30

Registration Fee: \$50.00

Monthly Payment: \$25.00

Term Payment (One-off): \$300.00

Term Payment (Monthly): \$300.00

Weekly Payment: \$5.80

Term Payment (Weekly): \$301.60

Setup Forms

Items

Type	Applied On	Disc	Limit	Per Trn	Cost	Sell	Disc Sell
Group	Parasite Dog	25%	No Limit	No Limit			
Group	Consultation	NO CHARGE	Max 2	No Limit			
Group	Orijen Promotional Products	10%	No Limit	No Limit			

Navigation: < > << >> - + Product Group + Product

Buttons: ✓ x

Registering a Patient to a Wellness Plan

1. Open Patient Record
2. Go to **Actions -> Loyalty -> Health Plans**
3. Click **Register** to open the Health Plan window
4. In Loyalty Scheme drop down menu choose the Wellness Plan the patient is registering for.
5. The Plan details will be loaded.
6. Choose the Instalment period the client wishes to pay by.
7. Click the Tick at the bottom of the window to save the plan.
8. Click the **Print** button to print or email the Registration forms for the client to sign and give back.
9. The plan can be exited at this point while the forms are completed.
10. The plan can be opened again later to complete by going to **patient record -> Actions -> Loyalty -> Health Plans -> Double click Health Plan**.
11. Once forms are signed tick **"Client has accepted terms and conditions of the policy"**. Until the client has accepted the terms and conditions of the plan the instalments will not be created.
12. Click the tick to save the plan.
13. A bill will be created for the registration, select whether the client wants to add the first instalment as well.
14. If the bill for the registration is cancelled so the client can pay later, then plan will not start and the client will not receive benefits of the plan. The registration can be paid at a later date by going to **Patient record -> Actions -> Loyalty -> Health Plans -> Double click health plan -> clicks action and select Make payment**.
15. Once the registration is paid the plan will begin.

Manage Health Plan

Dog Health Plan registration for Juno

Loyalty Scheme: Dog Health Plan Status: Active

Policy Term: 12 Premium: \$301.60 Reg Fee: \$50.00

Starts On: 8/09/2021 Finishes On: 7/09/2022 Terminated On:

- Instalment Payment

Every: Weekly Pay: \$5.80 Total Payable: \$351.60

Print Client has accepted the terms and conditions of the policy: ☒

- Plan Payment Summary

Last Paid On: Last Amt Paid: \$0.00 Total Paid: \$0.00

Overdue Amt: \$0.00 Balance: \$0.00

- Plan Sales Summary

Regular Value: Plan Value: Total Disc:

- Plan Benefit

Total Paid: \$0.00 Total Disc: Total Benefit: \$0.00

Payment Schedule Sales **Plan Items**

Applied On	Disc	Limit	Per Trn	Qty Sold	Avg Cost	Avg Sell	Tot Disc
Parasite Dog	25%	No Limit	No Limit	0.000	\$0.00	\$0.00	\$0.00
Consultation	NO CHARGE	Max 2	No Limit	0.000	\$0.00	\$0.00	\$0.00
Orijen Promotional Products	10%	No Limit	No Limit	0.000	\$0.00	\$0.00	\$0.00

✓ ✕

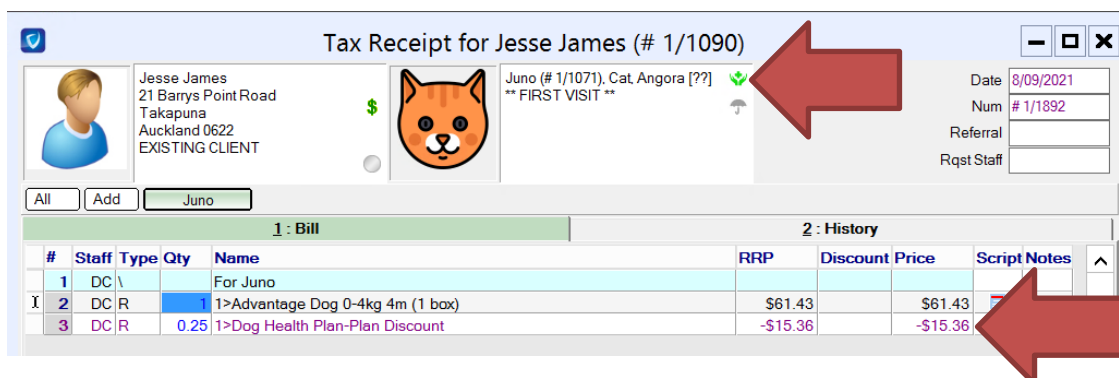
Redeeming Benefits at Billing

Identifying Patient has Wellness Plan

When a bill is made a wellness icon will appear at the top of the patient details on the bill. This will alert staff the patient is on the wellness plan.

Wellness Plan Free Items and Discounts at billing

Items can be sold as normal. If they are on the plan discounts will triggered automatically. If a discount is available the discount will be added as a new line on the bill. Any free items will be added with a 100% discount



Tax Receipt for Jesse James (# 1/1090)

Jesse James
21 Barrys Point Road
Takapuna
Auckland 0622
EXISTING CLIENT

Juno (# 1/1071), Cat, Angora [??]
** FIRST VISIT **

Date: 8/09/2021
Num: # 1/1892
Referral:
Rqst Staff:

All Add Juno

1: Bill				2: History				
#	Staff	Type	Qty	Name	RRP	Discount	Price	Script Notes
1	DC \			For Juno				
2	DC R		1	1>Advantage Dog 0-4kg 4m (1 box)	\$61.43		\$61.43	
3	DC R		0.25	1>Dog Health Plan-Plan Discount		-\$15.36	-\$15.36	

Wellness Plan Transaction Limits

Limit reached for Plan

Where a plan has a limit on purchases during the duration of a plan, once that limit is reached the new item will be added as normal without accruing any benefits.

Limit Reached on Bill

Where a plan has a purchase limit for an item within one bill, a message will popup when the bill is created saying;

“Cannot change item quantity. Health Plan bill limit reached. You can continue to sell the item by adding a new bill line item”

Adding a new line in the bill for the extra item but it will not accrue any benefits.

Wellness Plan Overdue Instalments / Grace Periods

If the wellness plan instalments are overdue and have exceeded the grace period within the plan template, a message will pop up when the bill is created saying;

“Health Plan Payment is overdue. Plan has been suspended, benefits will not apply. Would you like to override and apply benefits for this bill”

If overriding and applying benefits a staff member will need to log in with ID and password and be on an access level that has been given privileges to override the held status.

Paying Plan Instalments

Plans can be paid directly from the Patient record or from the Manage Recurring Payment Form.

Plan Payment from Patient Record

Go to **Patient Record -> Actions -> Loyalty -> Health Plans -> Double-click Health Plan Action -> Make Payment -> Pay invoice as needed.**

Plan Payments in Bulk from Recurring Payment Form

The Recurring Payment form for bulk payments is primarily designed for quickly reconciling payments in bulk from a bank statement or list from a payment service. It will list all due/unpaid invoices which you can quickly match a payment against rather than making new bill each time

1. Go to **Bills-> Special Functions -> Recurring Bills -> Manage Recurring Payments**
2. Tick the Instalments you want to make payments for
3. Click **F9: Add Payment**, this will add **Direct Credit** as the payment method for all ticked instalments.
4. Change Payment method and payment date on individual instalments where required.
5. Click **F12: Make Payments** to process the payments

Manage Recurring Payments

Date From: 3/10/2022 To: 31/10/2022 Status: Active Client: Bill Status: *ALL*

Inv...	Desc	Bill Date	Client	Patient Num	Patient	Bill State	Bill Amount	Due Amt	Repeats	Pmt Method	Pmt Date
<input checked="" type="checkbox"/>	338 Cat Health Plan Installment	5/10/2022	Percy Pointing	1022	Rafiki	Paid	\$13.50	\$0.00	1 Week		
<input checked="" type="checkbox"/>	374 Cat Health Plan Installment	9/10/2022	Percy Pointing	1022	Rafiki	Due	\$13.50	\$13.50	1 Week	D : Direct Credit	12/10/2022
<input checked="" type="checkbox"/>	339 Cat Health Plan Installment	9/10/2022	Lois Lane	1036	Krypton	Due	\$55.00	\$55.00	1 Month	D : Direct Credit	12/10/2022
<input checked="" type="checkbox"/>	340 Cat Health Plan Installment	9/10/2022	Lois Lane	1003	Superman	Due	\$55.00	\$55.00	1 Month	D : Direct Credit	12/10/2022

Navigation: <|> <|> <|> <|> <|> <|> Email Selected F9: Add Payment F11: Clear Payments F12: Make Payments AF3: Exit

Renewing plans

Automatic Renewing of Plans

Auto renewal takes place automatically prior to expiry if auto renew is ticked in plan definition. The new plan will be created a number of days ahead of the current plan expiring based on the Auto Renew (Days) setting configured in the health plan definition. So if Auto Renew is set to 5 days and the current plan expires on 31 May, then the new plan will be created on 26 May.

You can check which plans will auto renew by;

1. Go to **Utilities -> Manage Health Plans**.
2. Set **Finishes Between** dates.
3. Set **Auto** to **Yes**
4. If the **Next** column is filled in that is a link to the renewed plan that will be created.

Renewing Plans where Auto Renew is NO

If plans are not set to Auto Renew you must renew them manually. You can use the Manage Health Plans screen to help manage the renewals.

1. Go to **Utilities -> Manage Health Plans**.
2. Set **Finishes Between** dates.
3. Set **Auto** to **No**
4. **Tick** plan you wish to renew
5. Click **Update Plan** button
6. Click **Renew Selected**

Stopping a Plan from Renewing

If a client no longer wishes to continue the plan at the end of the term, then the plan will need to be set to Stop Renewing. To do this.

1. Go to **Utilities -> Manage Health Plans**.
2. Set **Finishes Between** dates.
3. Set **Auto** to **yes**
4. **Tick** plan you wish to stop renewing
5. Click **Update** at bottom of screen and then **Stop Renewal**

Manage Health Plan

Cat Health Plan registration for Superman

For general communication, please use Reports | Bulk Mailers. Health Plan filters and mail merge fields are available to utilise.

Plan: Starts Between: 9/12/2019 & 9/12/2019

Client: Finishes Between: ☒ 1/08/2023 & ☒ 1/10/2023

Patient: Status: Auto: ☒ Yes

Nu...	Name	Client	E-Mail	Patient	Spec...	Breed	Age	Start	Finish	Status	Repea...	Amt	Renew On	Next
<input type="checkbox"/>	3 Cat Health Pla Lois Lane	cfl.testacc@gmail.com	Superman	Dog	Aust Silky Terrier			15/08/2022	14/08/2023	Pending	Month	\$55.00	13/08/2023	
<input type="checkbox"/>	4 Cat Health Pla Ashlea Langley		Fish	Cat	Domestic Medium Hair			20/09/2022	19/09/2023	Active	One-off	\$600.00	18/09/2023	
<input type="checkbox"/>	2 Cat Health Pla Lois Lane	cfl.testacc@gmail.com	Krypton	Dog	Aust Silky Terrier			15/08/2022	14/08/2023	Active	Month	\$55.00	13/08/2023	

Recurring Payments

Update Plan

Renew Selected
Stop Renewal

Terminating a Plan

It is up to the clinic to decide the rules and processes for cancelling the plan. Terminating a plan in VetlinkPRO will cancel the plan so no more benefits will be offered for the patient. The health plans screen from the Patient record will show a plan benefit section so you can calculate any penalty invoices or refunds for the client. Penalty invoices or refunds must be entered manually by the clinic.

1. Open the Patient record
2. Go to **Actions -> Loyalty -> Health Plans**
3. Double click health plan
4. Click **Terminate** to cancel the plan.
5. The clinic then decides if any penalty invoices or refund will be billed to the client through the normal bill functions.

General Information

- Only one active plan can be assigned per patient.
- Health Plan discounts supersede all other discounts
- On complex product discounts only apply to the master item.

Recurring Invoices (Parasite Control)

As part of the health plan, you may send out things like parasite control to the members. To help manage this you can create recurring invoices. For example, you can create a recurring invoice for parasite control for a client that re-occurs every 3 months. You can then generate a list of parasite control recurring invoices for the month so you can see what orders need to be fulfilled. See Appendix 2 – Recurring Invoices for more information.

Appendix 2 - Recurring Invoices

Overview

Recurring invoices can be created for transactions that occur regularly every week/month/year. The Recurring invoices functions will then help you manage those as they become due. This is commonly used for managing things like parasite control. For example, you can create a recurring invoice for parasite control for a client that re-occurs every 3 months. You can then generate a list of parasite control recurring invoices for the month so you can see what orders need to be fulfilled.

Creating Recurring Invoice

- Go to;
 - Bills -> Special Functions -> Recurring Bills -> Create Recurring Invoice**
 - If you are creating recurring bills as part of a health plan open the patients' health plan and click the **Actions** button then **Recurring Invoice**.
- The recurring invoice window will open.
- Enter a description for the recurring invoice, e.g., parasite control.
- Enter the recur frequency and a start an end date.
- Click create bill.
- Add items to the bill as required and save and exit.
- You will be taken back to the recurring invoice window.
- Click **F12: OK** to finish the recurring bill.

Make Recurring Invoice

Client: Bernie Smith

Patient: Bella

Description: Worming

Every: 1 Month Start On: 9/09/2021 Finish On: 9/09/2021

Maintain Price: No Auto Post: No

Create New Bill Edit Bill Bill # 1/1900

Qty	Name	RRP	Disc	Price	Incen_Disc
0	For Bella	\$0.00	\$0.00	\$0.00	0
1	Advantage Cat 0-4kg 4m...	\$61.43	\$0.00	\$61.43	0

F12 : OK ESC : Cancel

Managing Recurring Invoice.

1. Go to **Bills -> Special Functions -> Recurring bills -> Manage Recurring Invoice.**
2. Enter the **Date range** for the recurring bills you wish to process.
3. Enter the **Description** of the bills you wish to process, e.g., Worming.
4. Tick any bills you wish to cancel then click **Cancel** selected.
5. If you wish to print Address Labels, Invoices, Drug Labels, Certificates or Handouts then tick the bill that need printing and then click the **Print** icon at the bottom of the window and select what you want printed.
6. Recurring bills without a tick in the **Ready** column indicate that they require user intervention when processing (e.g Process reminders, batch / expiry etc...) . These will popup when the bills are posted.
7. To finalise and charge the bill tick the bill you wish to finalise and click **Post selected.** The bills will be posted and charged to the client's account.

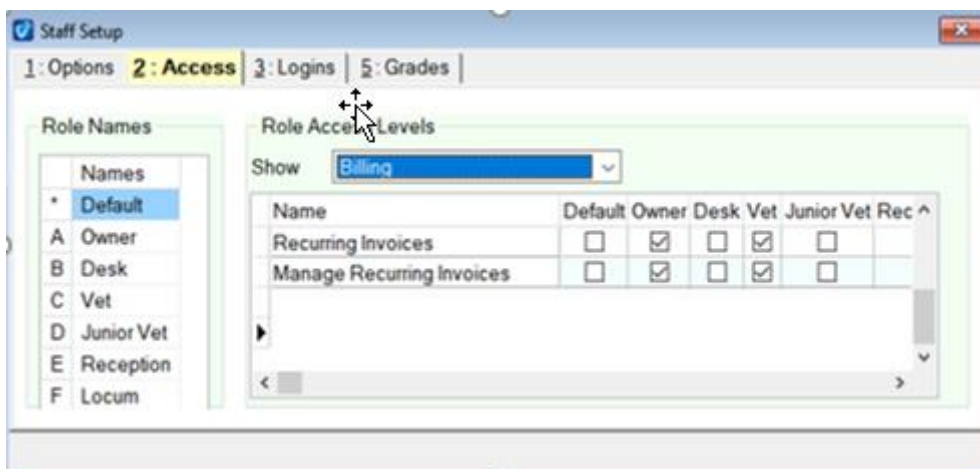
The screenshot shows the 'Manage Recurring Invoices' window. At the top, there are tabs for 'Pending' and 'All Invoices'. Below these are filters for 'Date From' (6/09/2021), 'To' (20/09/2021), 'Status' (Active), 'Client', 'Bill Status' (Open), and 'Ready' (*ALL*). A table lists three bills with columns: Inv #, Bill Date, Client, Patient, Rea..., Bill State, Desc, Start Date, Repeats, Next Bill Date, End Date, and Auto Po... The bills are for Bernie Smith (Bella), James Cannon, and Joe Bloggs (Fluffy). A 'Confirm' dialog box is open, asking 'Select options to Print.' with checkboxes for Client Address Label, Invoice, Drug Labels, Certificates, and Handouts. At the bottom, there are buttons for 'Email Selected', 'F9: Cancel Selected', 'F12: Post Selected' (highlighted with a red box), and 'AF3: Exit'. A red arrow points from the 'Print' icon in the bottom toolbar to the 'Confirm' dialog box.

Inv #	Bill Date	Client	Patient	Rea...	Bill State	Desc	Start Date	Repeats	Next Bill Date	End Date	Auto Po...
1/1900	9/09/2021	Bernie Smith	Bella		Open	Worming	9/09/2021	1 Month	9/10/2021		
1/1901	9/09/2021	James Cannon			Open	worming	9/09/2021	1 Month	9/10/2021		
1/1902	9/09/2021	Joe Bloggs	Fluffy		Open	Recurring Invoice	9/09/2021	1 Month	9/10/2021		

User Access Setup

Two access level control access to recurring billing as follows;

- **Recurring Invoice:** Control access to create a recurring invoice.
- **Manage Recurring Invoice:** Controls Access to manage and post recurring invoices.



General Information

End of Month

- When processing End of Month a check will be done to ensure there are no unposted Recurring Invoices in the current month. If there are unposted recurring invoices you will be prompted to post or cancel those before continuing.

Inventory

- Inventory is updated when the bill is posted.
- The inventory date will be set to the date the invoice is posted on, the bill date remains as the recurrence date.

Unsupported

- Restricted Product Prescriptions
- Repeat Prescriptions

Appendix 3 – PetSure / GapOnly Integration

Overview

The PetSure integration allows clinics to send claims directly to the insurance provider. Staff can pick the bills, clinical notes and attachments that relate to the claim and send them off in a simple process. GapOnly™ is currently in development and will be coming soon. For all integration enquiries please contact hello@gaponly.com.au to begin the integration process.



Setup

Enabling Integration

The integration will need to be enabled by following the steps below. This will usually be done by VetlinkPRO support staff once PetSure have accepted the clinic for the integration.

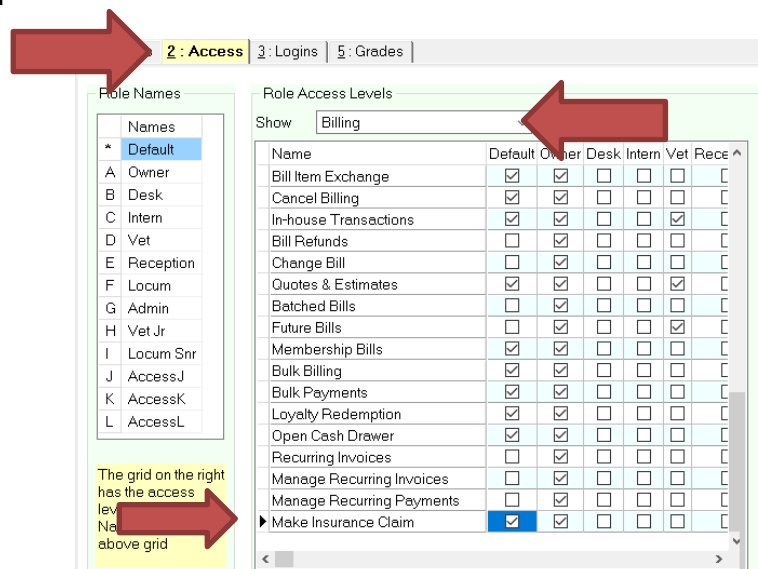
1. Contact PetSure to register for the integration.
2. VetlinkPRO will register the integration on their portal.
3. In VetlinkPRO go to **Options -> Setup -> Misc -> 8: Internet tab -> tick Enable PetSure Integration.**
4. **Register the PetSure Account**
 - a. Go to **Options -> Picklists -> Suppliers -> Insurance Providers**
 - b. Double click PetSure
 - c. In **Status** field set what module is to be enabled
 - i. **eClaim Only**
 - ii. **Active = Both eClaims and GapOnly™**
 - d. Enter **Username** and **Password** as provided by PetSure and click **Validate**.
 - e. All VetHub supported insurance companies and brands will be automatically populated in the list.

Set Access Levels to Make eClaims

The ability to make claims can be restricted to staff who are a member of a certain access level. To set which access levels can make claims go to;

Options -> Setup -> Log in with ID and Password -> Staff -> Access tab -> Change Show to Billing -> tick access levels that can Make Insurance Claims.

For more information on how access levels work please see the access level section in the Staff Management Chapter from the manual.



Register Insurance Policy

1. Open the Patient Record you wish to record insurance policy for.
2. Click the Insurance icon (Umbrella), or go to **Actions -> Insurance – Register**
3. Set **Service Provider** to **PetSure** if Insurance Provider is part of PetSure group.
4. Patient and client contact information should be pulled across for the linked records, however you can update contact information if required.
5. Select **Insurance Provider** and enter the **Policy Number**.
(If you are not sure of the policy number leave it blank and PetSure will attempt to validate the policy based on the contact information).
6. Click **Accept** to Save and Validate the policy.

The screenshot shows the VETLINKPRO software interface. The main window displays patient information for 'Fluffy' (Patient# 1/40079). The 'Register Insurance Policy' dialog box is open, showing fields for Service Provider (Non Integrated), Pet Name (Fluffy), Customer Name (Marrika Anderson), Email (cfl.testacc@gmail.com), Phone 1 (02741234567890), Phone 2, Insurance Provider, Policy Number, and Status (Not Validated). A red arrow points from the 'Insurance' icon in the main window to the dialog box. The dialog box has buttons for 'F12: Accept' and 'ESC: Cancel'.

Insurance Statuses

	No insurance policy
	Insurance Policy expired
	Insurance policy unknown / blank
	Insurance policy entered and validated

Making an eClaim

- There are a few ways to start an eClaim, including;
 - After paying a bill, if patient has insurance, a prompt will come up asking if “..you would like to start an eClaim?”. Just click **Yes** to start claim process.
 - Go to **Patient Record -> Actions -> Insurance -> Claim**
 - From **Account History** button -> **search and open bill -> Actions -> Make Insurance Claim**.
 - From **Client Record -> History tab -> find and open bill -> Actions -> Make Insurance Claim**.
- This will open the first page of the claims process showing details of the Policy holder, Patient, Vet and Claim amounts.
- Details should automatically be filled in, however you can edit them if needed.
- Click **Next**

PetSure Claims Module

New Claim for Oscar (70752) Grayer Jennifer (24783)

Our Reference	79	Status	New	Claim Total	\$0.00	Client Paid	\$0.00
Claim Ref				Total Disc	\$0.00	Amt Claimed	\$0.00
Type	eClaim			Total Tax	\$0.00	Amt Approved	\$0.00

Policy Holder		Vet Details	
Name	Grayer Jennifer	Staff	Lady Client Test
Email	wowtest1@petsure.com.au	Position	Practise Manager
Daytime Phone	0220209640	Email	nada@cfl.co.nz
Evening Phone	0400 111 999	Clinic/Branch	Barrys Point Vet Clinic
Mobile Phone	0220209640	Phone	Ph: (09) 489-2280
Address	21 Barrys Point Road Takapuna, Auckland 0622	Address	Barrys Point Rd, Takapuna, Auckland, North Shore
Post Code	0622	Post Code	9999

Patient		Claim Handler	
Name	Oscar	Staff	
Species	Dog	Email	
Breed	Cairn Terrier	Phone	
Dob	2012-12-27		
Microchip	E1234567899		
Provider	Woolworths		
Policy Number	WW00004195		

✓ F9 : Back ✓ F12 : Next ✓ F11 : Save ✗ Esc : Cancel

5. The Claim details page will open. Fill in;
 - a. First Noticed Date.
 - b. Treatment Start and Finish Date
 - c. Diagnosis
 - d. Complaint
 - e. Notes

6. Click **Next**

7. On the next form you can attach the bills, history notes and any attachments that are relevant to the claim by clicking **+** button in each section.

8. A terms and conditions screen will appear next. **Tick** that you have read terms and conditions and click **Submit**.
9. A blue message box should then appear to say claim submitted successfully.

PetSure Claims Module

New Claim for Oscar (70752) Grayer Jennifer (24783)

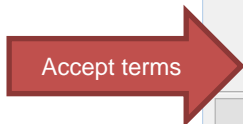
Our Reference	79	Status	New	Claim Total	\$591.42	Client Paid	\$591.42
Claim Ref		Total Disc	\$0.00	Amt Claimed	\$591.42		
Type	eClaim	Total Tax	\$77.14	Amt Approved	\$0.00		

I hereby agree that:

- All material submitted or that will be submitted by me in connection with this Claim is true, accurate and complete in all material respects and no relevant information has been withheld, including without limitation, the amount of payment that is made to the veterinary practice by the policyholder and any discounts which may have been applied;
- The veterinary practice has obtained the authority of the policyholder to:
 - submit this Claim on their behalf, including the collection, use and disclosure of their personal information for the purposes of preparing and submitting this Claim;
 - receive information from PetSure on the outcome of this Claim (including claim payment amount) and previous claims history; and
 - receive the claim payment amount from PetSure where the Claim is a GapOnly Claim.
- The veterinary practice verifies that:
 - For eClaims, it has received payment in full from the policyholder in respect of any services or treatment connected with the Claim; and
 - For GapOnly Claims, it will collect payment from the policyholder in respect of any services or treatment connected with the Claim, and only deduct from the submitted invoice the amount of the claim benefits (if any) advised by PetSure.
- PetSure and its personnel can request veterinary practice records connected with this Claim for audit purposes.

☐ I have read and agree to the terms and conditions.

✓ F9 : Back
✓ F12 : Submit
✓ F11 : Save
✗ Esc : Cancel



Information

i

Claim Submitted successfully.

Petsure reference is 8539c910-84b1-4532-a335-9c7ff95e7d7e

OK

GapOnly™ Claims

GapOnly™ Eligibility


- Clinic must be registered for GapOnly™, please contact PetSure for details
- Insurer must be GapOnly™ eligible
- Insurance policy must be GapOnly™ eligible
- GapOnly™ M claims can only be made on invoice not fully paid

Note: GapOnly™ claims cannot be processed outside service hours, or on public holidays

Checking for GAPOnly™ eligibility

At Billing

For clinics eligible for GapOnly™, an extra button is available at billing to check patient policy eligibility

F8 Old Bill	F11 Save/Ex	SF9 Disc Bill	Ctrl+N Notes	SF6 Rqst Sta	Quote	SF8 Remind		STotal GST	\$86.96 \$13.04
F9 New Bill	F12 Payment	SF10 Cancel	F4 Drug Lbl	SF7 Rebook	SF5 Referral	Actions		GapOnly	Total Total w ID

While Making a Claim

Select GAPOnly™ in the Type field while making a new claim


PetSure Claims Module

New Claim for Connie (70783) Giacomo McGready (24774)

Our Reference	61	Status	New	Claim Total	\$0.00	Client Paid	\$0.00
Claim Ref				Total Disc	\$0.00	Amt Claimed	\$0.00
Type	N : eClaim			Total Tax	\$0.00	Amt Approved	\$0.00
	G : GapOnly						

Policy Holder

Vet Details



Making an GapOnly™ Claim

1. There are a few ways to start a GapOnly™ claim, including;
 - a. After charging a bill, if patient has insurance, a prompt will come up asking if “**..you would like to start a new GapOnly claim?**”. Just click **Yes** to start claim process.
 - b. Go to **Patient Record -> Actions -> Insurance -> Claim -> Change Type to GapOnly**
 - c. From **Account History button -> search and open bill -> Actions -> Make Insurance Claim -> Change Type to GapOnly**
 - d. From **Client Record -> History tab -> find and open bill -> Actions -> Make Insurance Claim -> Change Type to GapOnly**

Note: To submit a GapOnly™ claim the bill must have some charged amount still due.

2. This will open the first page of the claims process showing details of the Policy holder, Patient, Claim Handler, Vet and Claim amounts.
3. Details should automatically be filled in, however you can edit them if needed.
4. Click **Next**

PetSure Claims Module

New Claim for Oscar (70752) Grayer Jennifer (24783)

Our Reference	79	Status	New	Claim Total	\$0.00	Client Paid	\$0.00
Claim Ref				Total Disc	\$0.00	Amt Claimed	\$0.00
Type	eClaim			Total Tax	\$0.00	Amt Approved	\$0.00

Policy Holder

Name: Grayer Jennifer
Email: wowtest1@petsure.com.au
Daytime Phone: 0220209640
Evening Phone: 0400 111 999
Mobile Phone: 0220209640
Address: 21 Barrys Point Road Takapuna, Auckland 0622
Post Code: 0622

Patient

Name: Oscar
Species: Dog
Breed: Cairn Terrier
Dob: 2012-12-27
Microchip: E1234567899
Provider: Woolworths
Policy Number: WW00004195

Vet Details

Staff: Lady Client Test
Position: Practise Manager
Email: nada@cfl.co.nz
Clinic/Branch: Barrys Point Vet Clinic
Phone: Ph: (09) 489-2280
Address: Barrys Point Rd, Takapuna, Auckland, North Shore
Post Code: 9999

Claim Handler

Staff:
Email:
Phone:

Navigation: ✓ F9 : Back ✓ F12 : Next ✓ F11 : Save ✗ Esc : Cancel

5. The Claim details page will open. Fill in;
 - a. First Noticed Date.
 - b. Treatment Start and Finish Date
 - c. Diagnosis
 - d. Complaint
 - e. Notes
6. Click **Next**

PetSure Claims Module

New Claim for Oscar (70752) Grayer Jennifer (24783)

Our Reference	79	Status	New	Claim Total	\$0.00	Client Paid	\$0.00
Claim Ref		Total Disc	\$0.00	Amt Claimed	\$0.00		
Type	eClaim	Total Tax	\$0.00	Amt Approved	\$0.00		

Treatment

First Noticed: 29/10/2021 **5a** Treatment Start: 29/10/2021 Finish: 29/10/2021 **5b**

Diagnosis: Dog Attack **5c**

Complaint: Wounds from being attachd by another dog in the park **5d**

Notes: Has deep wounds on legs that need stitches and antibiotics **5e**

Buttons: **F9: Back** **F12: Next** **F11: Save** **Esc: Cancel**

7. On the next form you can attach the bills, history notes and any attachments that are relevant to the claim by clicking **+** button in each section.
 Note: Only image and PDF type files may be attached [NR]

PetSure Claims Module

New Claim for Oscar (70752) Grayer Jennifer (24783)

Our Reference	79	Status	New	Claim Total	\$591.42	Client Paid	\$591.42
Claim Ref		Total Disc	\$0.00	Amt Claimed	\$591.42		
Type	eClaim	Total Tax	\$77.14	Amt Approved	\$0.00		

Bills

Bill Number	Bill Date	Subtotal	Disc	Tax	Total
817297	2021-07-26	\$514.28	\$0.00	\$77.14	\$591.42

History

Date	Bill	Summary
2021-09-29	817391	test

Attachments

File Name	Type
Photo 1	.BMP

Buttons: **F9: Back** **F12: Next** **F11: Save** **Esc: Cancel**

Red arrows point to '+' buttons with labels: **Add Bills**, **Add History Notes**, **Add Attachments**

8. A terms and conditions screen will appear next. **Tick** that you have read terms and conditions and click **Submit**.
9. A blue message box should then appear to say claim submitted successfully.

PetSure Claims Module

New Claim for Oscar (70752) Grayer Jennifer (24783)

Our Reference	79	Status	New	Claim Total	\$591.42	Client Paid	\$591.42
Claim Ref				Total Disc	\$0.00	Amt Claimed	\$591.42
Type	eClaim			Total Tax	\$77.14	Amt Approved	\$0.00

I hereby agree that:

- All material submitted or that will be submitted by me in connection with this Claim is true, accurate and complete in all material respects and no relevant information has been withheld, including without limitation, the amount of payment that is made to the veterinary practice by the policyholder and any discounts which may have been applied;
- The veterinary practice has obtained the authority of the policyholder to:
 - submit this Claim on their behalf, including the collection, use and disclosure of their personal information for the purposes of preparing and submitting this Claim;
 - receive information from PetSure on the outcome of this Claim (including claim payment amount) and previous claims history; and
 - receive the claim payment amount from PetSure where the Claim is a GapOnly Claim.
- The veterinary practice verifies that:
 - For eClaims, it has received payment in full from the policyholder in respect of any services or treatment connected with the Claim; and
 - For GapOnly Claims, it will collect payment from the policyholder in respect of any services or treatment connected with the Claim, and only deduct from the submitted invoice the amount of the claim benefits (if any) advised by PetSure.
- PetSure and its personnel can request veterinary practice records connected with this Claim for audit purposes.

☐ I have read and agree to the terms and conditions.

✔ F9 : Back

✔ F12 : Submit

✔ F11 : Save

✖ Esc : Cancel

Information

i

Claim Submitted successfully.
Petsure reference is 8539c910-84b1-4532-a335-9c7ff95e7d7e

OK

Accept terms

GapOnly™ Status Update

Once a GapOnly™ claim is submitted, it will take about 15 minutes for the insurance claim to be processed and result returned as to whether or not it is accepted and how much of the submitted amount is approved for cover. The **Umbrella** in the notification bar will flash indicating there is a status update, click this to view the claim status in the **Management Insurance Claims** screen



Taking Gap Payment

1. Use the Management Insurance Claims to process GapOnly™ Payments.
2. Once a GapOnly™ claim is submitted and accepted the status will change to “**Awaiting Pmt**”, the Approved (benefit) amount is also shown
3. A payment of the Gap amount will need to be taken for the claim to be settled, use the **Make Payment** button to take the payment.

Insurance Claim

Claim Date Between 09/12/2019 To 09/12/2019 Claim Amount Between \$ and \$

Client Animal

Type All Status *ALL* Claim Ref

Num	Date	Branch	Provider	Status	Client	Patient	Speci...	Approv...	Claim...	Pmt Bill	Pmt A...	Fees	
1/62	30/03/2022	Takapuna	Woolworths	GapOnly	Awaiting Pmt	Giacomo McGready	Connie	Dog	\$255.00	\$300.00		\$0.00	\$0.00
1/61	30/03/2022	Takapuna	Woolworths	GapOnly	Awaiting Pmt	Giacomo McGready	Connie	Dog	\$75.00	\$100.00		\$0.00	\$0.00
1/60	30/03/2022	Takapuna	Woolworths	GapOnly	GAP Processing	Giacomo McGready	Connie	Dog	\$95.00	\$100.00		\$0.00	\$0.00
1/59	30/03/2022	Takapuna	Woolworths	GapOnly	Settled	Giacomo McGready	Connie	Dog	\$100.00	\$300.00	1/815758	\$95.00	\$5.00
1/56	30/03/2022	Takapuna	Guidedogs	GapOnly	Declined	Ermengarde Mansion Finn	Dog		\$0.00	\$2,600.00		\$0.00	\$0.00
1/54	30/03/2022	Takapuna	Guidedogs	GapOnly	Settled	Ermengarde Mansion Reef	Dog		\$275.00	\$500.00	1/815754	\$270.00	\$5.00
1/52	30/03/2022	Takapuna	Woolworths	GapOnly	Settled	Giacomo McGready	Connie	Dog	\$111.11	\$200.00	1/815744	\$106.11	\$5.00
1/50	30/03/2022	Takapuna	Woolworths	GapOnly	Declined	Giacomo McGready	Connie	Dog	\$0.00	\$650.00		\$0.00	\$0.00
1/49	30/03/2022	Takapuna	Woolworths	GapOnly	Declined	Giacomo McGready	Connie	Dog	\$0.00	\$100.00		\$0.00	\$0.00
1/48	29/03/2022	Takapuna	Guidedogs	GapOnly	GAP Processing	Ermengarde Mansion Finn	Dog		\$190.00	\$250.00		\$0.00	\$0.00
1/47	29/03/2022	Takapuna	Guidedogs	GapOnly	Pmt Submitted	Ermengarde Mansion Finn	Dog		\$180.00	\$300.00		\$0.00	\$0.00
1/46	28/03/2022	Takapuna	Guidedogs	GapOnly	Pmt Submitted	Ermengarde Mansion Reef	Dog		\$547.98	\$703.50		\$0.00	\$0.00
1/45	28/03/2022	Takapuna	Guidedogs	GapOnly	Declined	Ermengarde Mansion Finn	Dog		\$0.00	\$363.29		\$0.00	\$0.00
1/43	28/03/2022	Takapuna	Guidedogs	GapOnly	Cancelled	Ermengarde Mansion Finn	Dog		\$0.00	\$276.67		\$0.00	\$0.00
1/42	28/03/2022	Takapuna	Australia Post	eClaim	Processing	Cordelia Thresher	Pepper	Dog	\$0.00	\$256.42		\$0.00	\$0.00
1/41	28/03/2022	Takapuna	Australia Post	eClaim	Processing	Cordelia Thresher	Dixie	Dog	\$0.00	\$200.00		\$0.00	\$0.00
1/39	28/03/2022	Takapuna	Guidedogs	GapOnly	Settled	Ermengarde Mansion Finn	Dog		\$342.64	\$403.10	1/815618	\$339.90	\$2.74
1/38	28/03/2022	Takapuna	Guidedogs	GapOnly	Settled	Ermengarde Mansion Reef	Dog		\$255.00	\$300.00	1/815617	\$252.96	\$2.74
1/37	28/03/2022	Takapuna	Guidedogs	GapOnly	Settled	Ermengarde Mansion Reef	Dog		\$125.00	\$150.00	1/815605	\$123.00	\$2.00
1/36	28/03/2022	Takapuna	Guidedogs	GapOnly	Settled	Ermengarde Mansion Finn	Dog		\$180.00	\$200.00	1/815602	\$175.00	\$5.00
1/35	28/03/2022	Takapuna	Guidedogs	GapOnly	Settled	Ermengarde Mansion Reef	Dog		\$180.00	\$200.00	1/815599	\$175.00	\$5.00
1/33	28/03/2022	Takapuna	Guidedogs	GapOnly	Processing	Ermengarde Mansion Finn	Dog		\$200.00	\$200.00	1/815595	\$190.00	\$10.00

◀ ▶ ⏪ ⏩ ↺ ↻

Poll Status

Update Status

Make Payment

4. The Payment screen shows invoices submitted on claims and due to be paid in red font, the allocated payment amount cannot exceed the Gap payment required. In order for the claim to be settled the full Gap amount must be paid.

Make Gap payment.

3 Mth +	\$0.00	Owed On Last Statement	\$0.00
2 Mth	\$0.00	Charged Since	\$1,482.00
1 Mth	\$0.00	Paid Since	-\$1,039.60
Current	\$1,482.00		
Total Owning	\$1,482.00		

Date	Desc	Total	Due	Allocation
30/03/2022	Invoice 815762 *	\$100.00	\$100.00	\$15.00
30/03/2022	Invoice 815763 *	\$50.00	\$50.00	\$7.50
30/03/2022	Invoice 815764 *	\$150.00	\$150.00	\$22.50

Amount to Pay: \$45.00

Buttons:

This invoice has insurance claim/s for a total of \$85.00.

GapOnly™ Claim Settlement

The settlement will take place automatically. Once PetSure are ready to settle the claim a payment will be made directly into VetlinkPRO with the Fee collected by PetSure for the claim settlement recorded. An example of this is shown below. When claim settlement has been posted the Umbrella will flash indicating a change of status, this will show as “**Settled**”

Tax Invoice for McGready Giacomo (# 1/24774) Branch Takapuna Till# 1

McGready Giacomo
41342 Holy Cross Trail
Prospect
Sa 5082 5082
EXISTING CLIENT

Inv Num # 1/815758
Rqst Staff
Tax Invoice
Insurance Payment

Owes \$1,182.00 Sequence No. 4075

1 : Bill

#	Staff	Type	Qty	Name	RRP	Discount	Price	Script	Notes	Batch	Expiry Dt
1	AA	M		Payment towards Insurance 59							
2	AA	M		for Connie							
3	AA	AP		1>Payment for Invoice# 1/815755	\$100.00		\$100.00				
4	AA	S	1	1>Insurance Fees	-\$5.00		-\$5.00				

Account Status
ClnUpdtd
30/03/2022 3:58:06 pm
Inventory Status
StkUpdtd
30/03/2022 3:58:06 pm


Date	TypeS	Amount	Reference
30/03/2022	Insurance Paymen	\$95.00	

Sub Total	\$95.65
GST	-\$0.65
Total	\$95.00
Due	\$0.00


Buttons:

In Account History, claim details and payments are show for transactions lodged on claims

Tax Invoice for McGready Giacomo (# 1/24774) Branch Takapuna Till# 1



McGready Giacomo
41342 Holy Cross Trail
Prospect
Sa 5082 5082
EXISTING CLIENT



Connie (# 1/70783), Dog, Greyhound [??]. Age:
12 yr 2 mth [16/01/2010]
Last visit at 30/03/2022
No Reminder Due

Inv Num **# 1/815755**
Rqst Staff
Tax Invoice

Owes \$1,482.00 Sequence No. 4075

All Connie

1 : Bill

#	Staff	Type	Qty	Name	RRP	Discount	Price	Script	Notes	Batch	Expiry Dt
1				For Connie							
2	OT	CD	3	T>Consultation Dog	\$300.00		\$300.00				

Sub Total for Connie including GST \$300.000

Insurance Claim Lodged, Claim Num 59, Amount Claimed \$300.00, Approved \$100.00, GAP \$200.00.

Account Status

ClinUpdtd
30/03/2022 3:47:41 pm

Inventory Status

StkUpdtd
30/03/2022

Date	TypeS	Amount	Reference
30/03/2022	Charge	\$300.00	
30/03/2022	Payment	\$20.00	On Bill# 1/815756
30/03/2022	Payment	\$180.00	On Bill# 1/815757
30/03/2022	Insurance Settlement	\$100.00	On Bill# 1/815758

Sub Total \$260.87

GST \$39.13

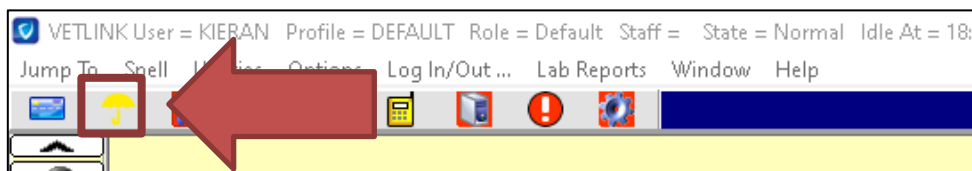
Total \$300.00

Due \$0.00

By_Ref Actions AF3 : Exit

Viewing Claim Status / Previous Claims

1. You can view the claims made and status of claims by either
 - a. Clicking the **Umbrella** icon in notification bar at top of screen.
 - b. **Utilities -> Manage Insurance Claims**



Insurance Claim

Claim Date Between: 9/12/2019 To: 9/12/2019 Claim Amount Between: \$ and \$

Client: Animal: Claim Ref:

Type: All Status: *ALL*

Num	Date	Branch	Provider	Type	Status	Client	Patient	Speci...	Approv...	Claim...	St...	Claim Ref	Pmt Bill	Pmt A...
1/34	24/09/2020	Takapuna		GapOnly	Processing	Jennifer Gray	Oscar	Dog	\$150.00	\$180.00	RS	40cc5353-883-43fc		\$0.0
1/35	24/09/2020	Takapuna		eClaim	Processing	Mrs. Megan Hair	Pepper	Dog	\$0.00	\$125.92	RS	09a3d3e8-c8e6-486		\$0.0
1/36	4/11/2020	Takapuna		GapOnly	Pmt Submitted	Jennifer Gray	Oscar	Dog	\$172.00	\$236.07	RS	aa29b98c-b16b-4e		\$0.0
1/37	4/11/2020	Takapuna		GapOnly	Pmt Submitted	Jennifer Gray	Oscar	Dog	\$98.00	\$141.66	RS	73978ae-5d5d-47e		\$0.0
1/38	25/03/2021	Takapuna		GapOnly	Awaiting Pmt	Jennifer Gray	Oscar	Dog	\$350.00	\$436.07	OWN	4d5a174d-c0f4-442f		\$0.0
1/39	31/03/2021	Takapuna		eClaim	Submitted	Jennifer Gray	Oscar	Dog	\$0.00	\$36.51	OWN	3c9f3796-22e8-447c		\$0.0
1/42	12/04/2021	Takapuna		eClaim	New	Mr. Darren Pritchard	Hunter	Dog	\$0.00	\$160.00	OWN	0ab87cfd-4cb0-450f		\$0.0
1/49	13/04/2021	Takapuna		GapOnly	Submitted	Jennifer Gray	Oscar	Dog	\$0.00	\$180.00	OWN	e1c30394-5ab9-4d5		\$0.0
1/50	22/04/2021	Takapuna		GapOnly	Submitted	Jennifer Gray	Oscar	Dog	\$0.00	\$180.00	OWN	74921f6a-d985-494f		\$0.0
1/51	13/05/2021	Takapuna		eClaim	Submitted	Jennifer Gray	Oscar	Dog	\$0.00	\$100.00	OWN	b6d82564-178a-413		\$0.0
1/55	29/07/2021	Takapuna		eClaim	Submitted	Jennifer Gray	Oscar	Dog	\$0.00	\$722.39	OWN	a4eab801-6866-401		\$0.0
1/78	29/09/2021	Takapuna		GapOnly	Settled	Jennifer Gray	Oscar	Dog	\$150.00	\$180.00	OWN	f76653ef-e596-421f	1/817393	\$145.0
1/79	29/10/2021	Takapuna	Woolworths	eClaim	Submitted	Jennifer Gray	Oscar	Dog	\$0.00	\$591.42	OWN	8539c910-84b1-453		\$0.0
1/76	20/08/2021	Takapuna		eClaim	Submitted	Jennifer Gray	Oscar	Dog	\$0.00	\$120.00	OWN	d94e9c69-6e1e-432		\$0.0
1/77	20/08/2021	Takapuna		GapOnly	Submitted	Jennifer Gray	Oscar	Dog	\$0.00	\$591.60	OWN	1876c467-a235-493		\$0.0
1/75	18/08/2021	Takapuna		eClaim	Submitted	Jennifer Gray	Oscar	Dog	\$0.00	\$633.28	OWN	8e1b401f-262f-4b6c		\$0.0

Poll Status Update Status Make Payment Exit

2. All claims, including GapOnly™ and eClaims will be listed here.

New	New Claim that hasn't been submitted.
Submitted	Claim submitted successfully
Processing	Claim is being processed by the insurance company.
Accepted	Claim accepted by insurance company
Awaiting Pmt	Received GapOnly™ approval from insurance company and waiting for payment from the client.
Pmt Submitted	Gap payment received and details submitted to insurance company
Settled	Settled and money in account.
Rejected	Claim declined by insurance company
Cancelled	Claim Cancelled
Error	Error happened (may not happen)

3. Use the filters at the top of the window to help search for a specific claim.
4. Double-click on any of the claims to bring detail of the claim.
5. From the claim details click **Next** at the bottom of form to see the Notes, Bills, History Notes and attachments that were sent.

PetSure Claims Module

Claim for Oscar (70752) Grayer Jennifer (24783)

Our Reference	β6	Status	Pmt Submitted	Claim Total	\$236.07	Client Paid	\$0.00
Claim Ref	aa29b98c-b16b-4e75-b325-d298d05bad98			Total Disc	\$22.81	Amt Claimed	\$236.07
Type	GapOnly			Total Tax	\$30.79	Amt Approved	\$172.00
Message	Claim benefit paid in full. Based on benefit % and re						

Policy Holder	Vet Details
Name	Grayer Jennifer
Email	wowtest1@petsure.com.au
Daytime Phone	0220209640
Evening Phone	0400 111 999
Mobile Phone	0220209640
Address	21 Barrys Point Road Takapuna, Auckland 0622
Post Code	0622
Patient	Claim Handler
Name	Oscar
Species	Dog
Breed	Cairn Terrier
Dob	2012-12-27
Microchip	E1234567899
Provider	Woolworths
Policy Number	WW00004195

Staff	Dr. Sides Richard
Position	Veterinarian
Email	razal@cfl.co.nz
Clinic/Branch	Barrys Point Vet Clinic
Phone	Ph: (09) 489-2280
Address	Barrys Point Rd, Takapuna, Auckland, North Shore
Post Code	9999
Staff	Dr. Sides Richard
Email	razal@cfl.co.nz
Phone	

Click Next to see bills/history sent

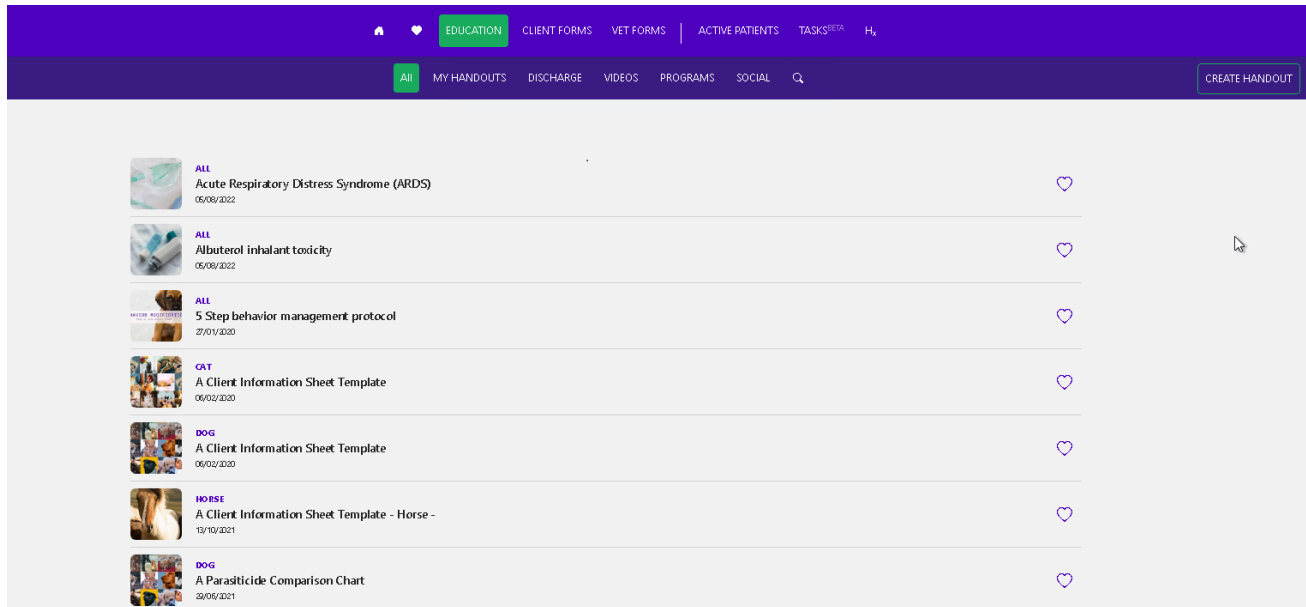
F9 : Back F12 : Next Esc : Close

Appendix 4 - VetCheck Integration

VetlinkPRO's VetCheck integration allows users to quickly prefill forms, questionnaire's and information sheets in VetCheck with client and patient details from VetlinkPRO and then quickly share/email those to clients. A link to the shared document then automatically gets saved back to the patients clinical history or Document Manager depending on where it was requested from.

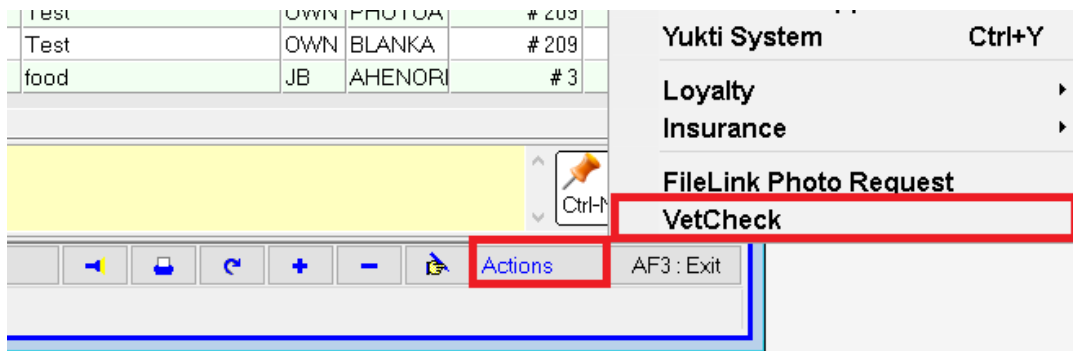
Enabling VetCheck

You will first need to sign up with an account from VetCheck. The VetCheck integration is an extra module in VetlinkPRO so once you are ready to integrate, please contact sales@cfl.co.nz to enable this.

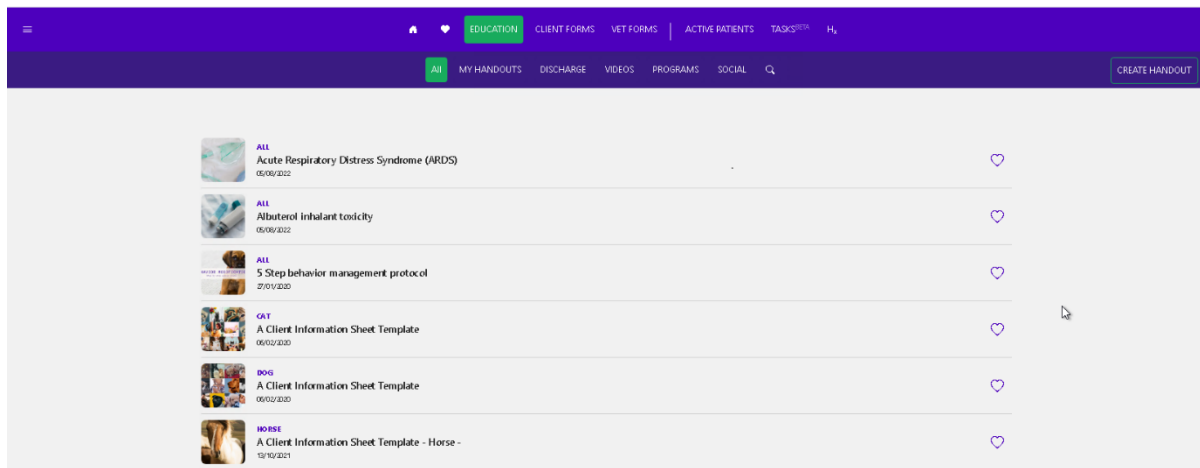


VetCheck Request from Patient Record

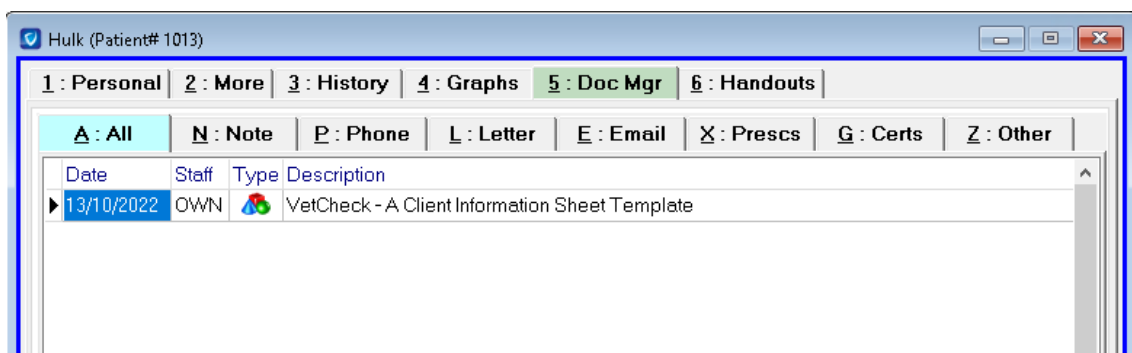
1. Open the Patient record you wish to request a VetCheck form from
2. Go to **Actions -> VetCheck**



3. The VetCheck Login page will open
4. Log in with VetCheck credentials
5. Choose form from VetCheck (for more information on selecting / choosing/ sharing forms contact VetCheck)

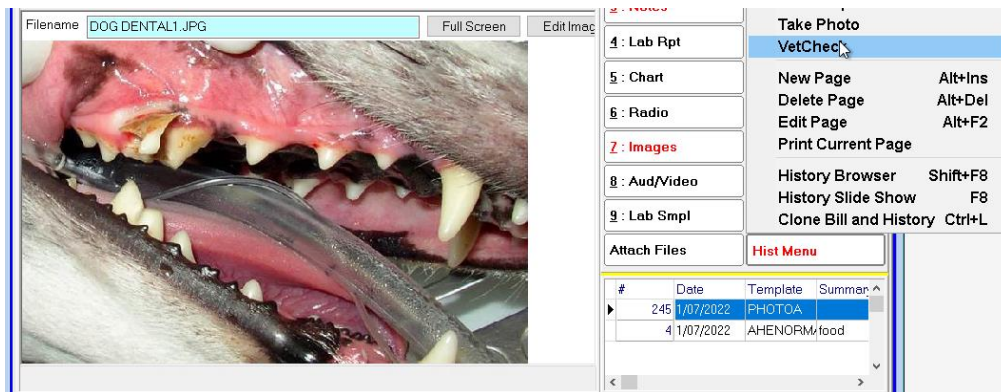


6. Form should be populated with client / patient details from VetlinkPRO
7. Share / Send form
8. A URL link will be created in the Patient document manger to view the form.

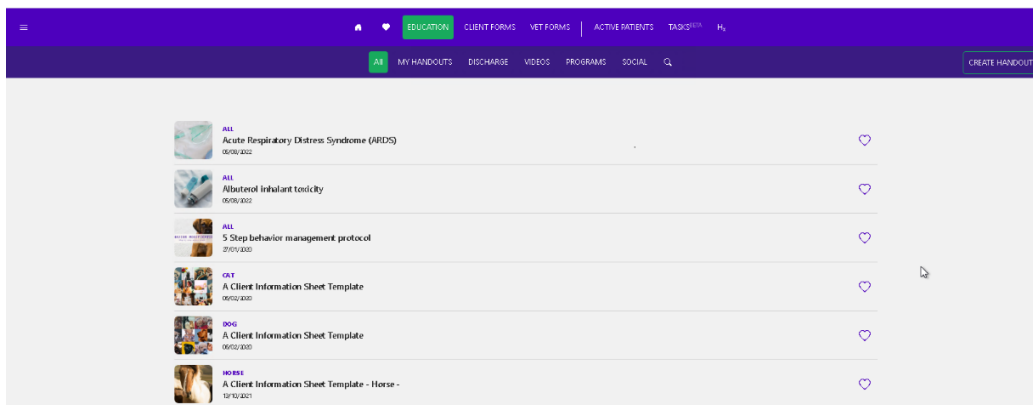


VetCheck Requests from Clinical History

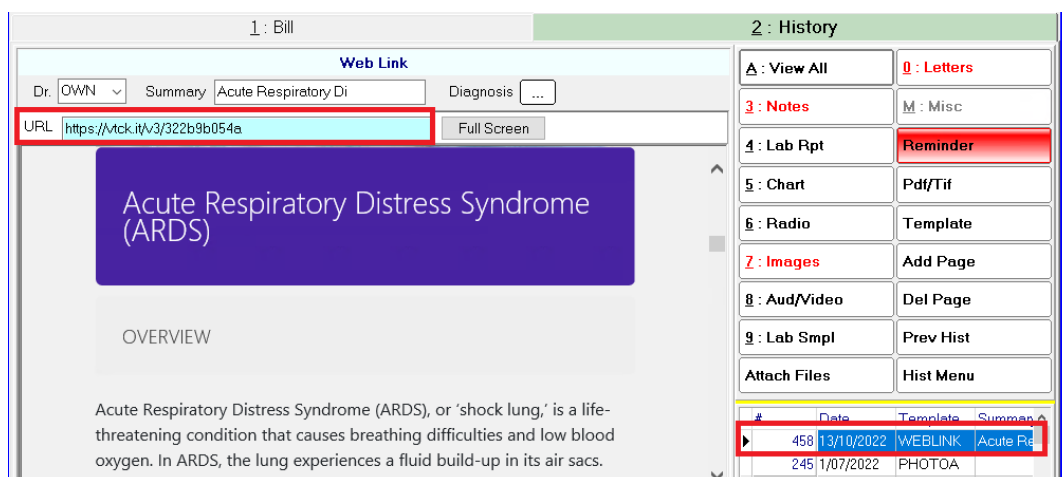
1. Open the Clinical history from the bill for a patient
2. Go to Hist Menu -> VetCheck



3. The VetCheck Login page will open
4. Log in with VetCheck credentials
5. Choose form from VetCheck (for more information on selecting / choosing/ sharing forms contact VetCheck)

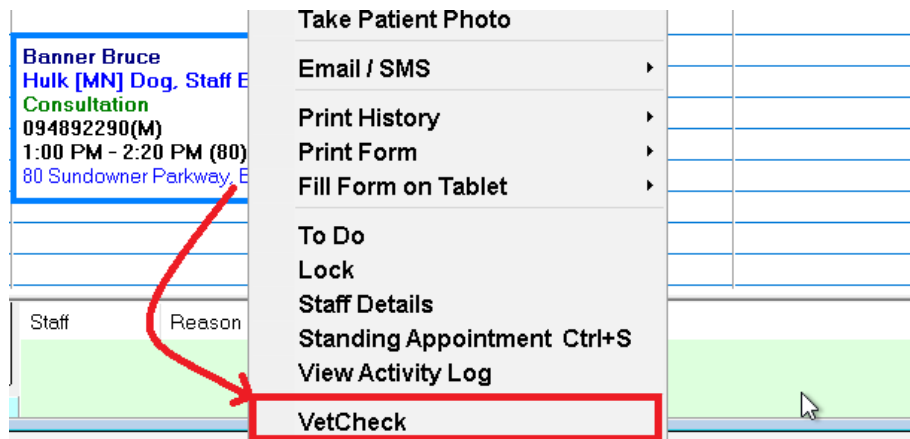


6. Form should be populated with client / patient details from VetlinkPRO
7. Share / Send form
8. A URL link will be created in the clinical history to view the form.
(You may need to close and open the bill/history for the link to appear in the clinical history)

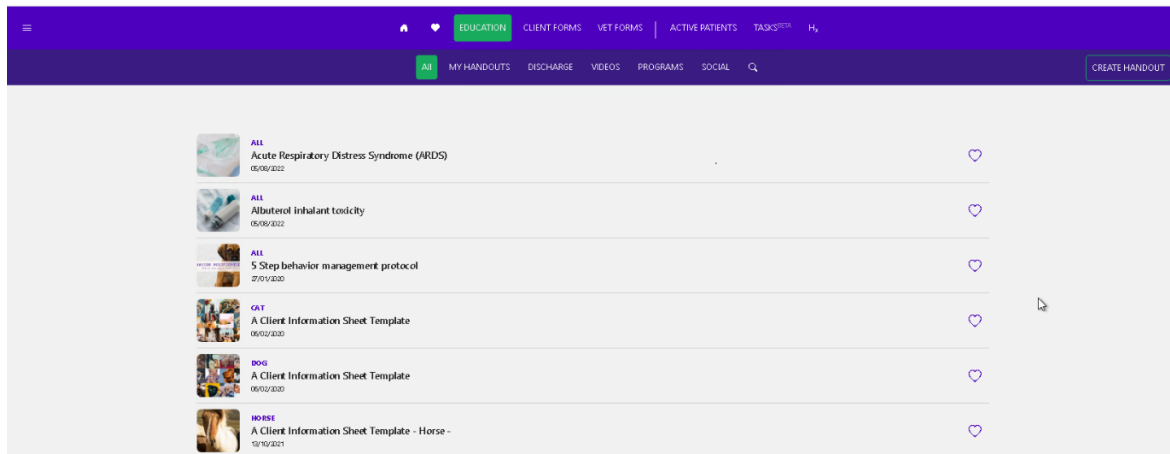


VetCheck Request from Appointment

1. Open the Appointment Book and right click on the appointment you wish to request a VetCheck form from and select **VetCheck**



2. The VetCheck Login page will open
3. Log in with VetCheck credentials
4. Choose form from VetCheck (for more information on selecting / choosing/ sharing forms contact VetCheck)



5. Form should be populated with client / patient details from VetlinkPRO
6. Share / Send form
7. A URL link will be created in the Patient document manger to view the form.

