

# INSURANCE

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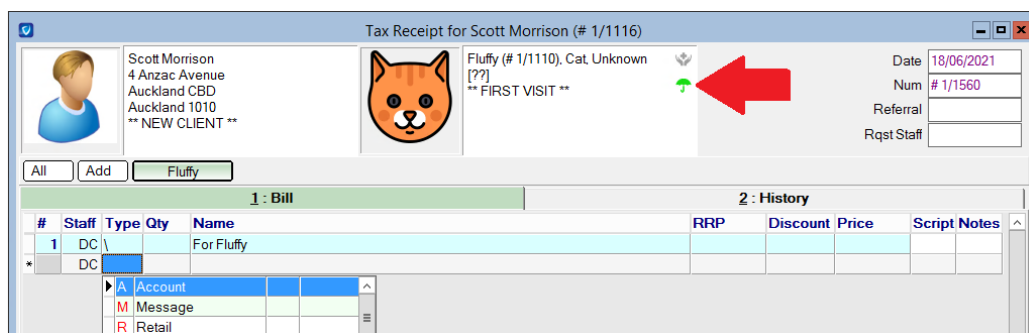
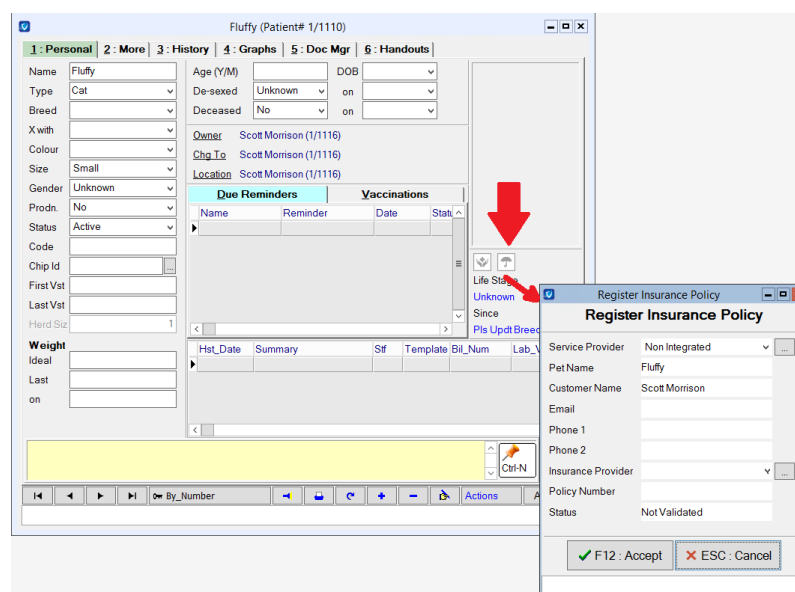
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# NON INTEGRATED

## Recording Insurance Details

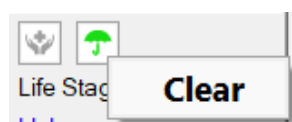
Patient Insurance details can be added from the patient record. To add the details:

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.



## Clearing Insurance Details from Patient

1. Open Patient Record
2. Right click insurance icon (umbrella)
3. Select Clear



# PETSURE 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](mailto:hello@gaponly.com.au) to begin the integration process.

## Setup

### General Ledger

If using the General Ledger module, you will need to assign general ledger codes to the following service and payment records:

- 1- Insurance Fees, this requires a GL Sales account to be assigned. The Insurance Fee can be found in the [Product file](#).
- 2- Insurance Payment method, this requires a bank account assigned, you will find this in [Options -> Picklists -> Financials -> Till Payments](#)

### 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.

The grid on the right has the access levels for each Name from the above grid

Name	Default	Owner	Desk	Intern	Vet	Rece
Bill Item Exchange	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cancel Billing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
In-house Transactions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Bill Refunds	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Change Bill	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quotes & Estimates	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Batched Bills	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Future Bills	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Membership Bills	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bulk Billing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bulk Payments	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Loyalty Redemption	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Open Cash Drawer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recurring Invoices	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manage Recurring Invoices	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manage Recurring Payments	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Make Insurance Claim	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## 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.

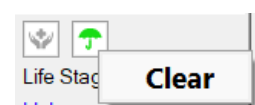
## Insurance Statuses

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

Notes: Both phone number and email are required to submit a claim.

## Clearing Insurance Details from Patient

1. Open Patient Record
2. Right click insurance icon (umbrella)
3. Select Clear



## Making an eClaim

1. There are a few ways to start an eClaim, including;
  - a. 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.
  - b. Go to **Patient Record -> Actions -> Insurance -> Claim**
  - c. From **Account History button -> search and open bill -> Actions -> Make Insurance Claim**.
  - d. From **Client Record -> History tab -> find and open bill -> Actions -> Make Insurance Claim**.

**Note:** to submit an eClaim the bill must be fully paid.

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		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		

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**

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.

**Information**

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



## Making a GapOnly™ Claim

### 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 \$86.96
F9 New Bill	F12 Payment	SF10 Cancel	F4 Drug Lbl	SF7 Rebook	SF5 Referral	Actions		GST \$13.04
							<b>GapOnly</b>	Total \$100.00
								Total w ID \$100.00

### GapOnly™ Button Not Available


If the GapOnly™ button is not showing on the billing screen and the policy has been added and validated on the patient record, you can refresh the screen by clicking on the All button then clicking back on the Patient Name button.

### 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	<div> <span>N : eClaim</span> <div> <span>N : eClaim</span> <span>G : GapOnly</span> </div> </div> 			Total Tax	\$0.00	Amt Approved	\$0.00
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		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	Caim Terrier	Phone	
Dob	2012-12-27		
Microchip	E1234567899		
Provider	Woolworths		
Policy Number	WW00004195		

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**

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:

1. 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;
2. The veterinary practice has obtained the authority of the policyholder to:
  - (a) 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;
  - (b) receive information from PetSure on the outcome of this Claim (including claim payment amount) and previous claims history; and
  - (c) receive the claim payment amount from PetSure where the Claim is a GapOnly Claim.
3. The veterinary practice verifies that:
  - (a) For eClaims, it has received payment in full from the policyholder in respect of any services or treatment connected with the Claim; and
  - (b) 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.
4. 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.

Accept terms

**Information**

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

### Making an GapOnly™ Claim for Bill with Multiple Patients

When finishing a bill a claim can only be made for one patient. To make a claim for another patient:

1. Open the bill again by either:
  - a. Open **Client Record** -> Click **History** tab -> Open relevant bill
  - b. Click **Account History** button and search for bill by date or bill number.
2. Click **Patient Name** button for patient you are making claim for.
3. Click **Actions** button at bottom of the bill and choose **Make Insurance Claim**
4. Fill in claim information and submit claim as per normal procedure.

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

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		
<b>Total Owning</b>	<b>\$1,482.00</b>		

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

Invoices on open payments are excluded from the list.

Amount to Pay: \$45.00

Buttons: **✓ F12 : Accept** | **✗ ESC : Cancel**

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

### Using Credit to Make Gap Payment

If the client has credit or a deposit on their account they wish to use to make a gap payment then follow the steps below.

1. Open Client Record
2. Click the drop down menu next the credit balance.
3. Select **Allocate credit**
4. Allocate credit to relevant GapOnly™ bill
5. Click **Accept**.

### Pay GapOnly™ Bill in Full

If the client decides to pay bill in full rather than just gap amount you can do this from the Claim Management screen.

1. Open **Claim Management Screen** by clicking the Insurance notification button (Umbrella) at top of VetlinkPro.
2. Select claim to Pay
3. Click **Make Payment** button at bottom of management window.
4. Payment amount will default to Gap amount but you can overwrite that and enter full amount.

## 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

Actions AF3 : Exit

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

**1 : Bill**

#	Staff	Type	Qty	Name	RRP	Discount	Price	Script	Notes	Batch	Expiry Dt
1				For Connie							
2	OT	CD	3	1>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  
ClnUpdtd  
30/03/2022 3:47:41 pm  
Inventory Status  
StkUpdtd  
30/03/2022

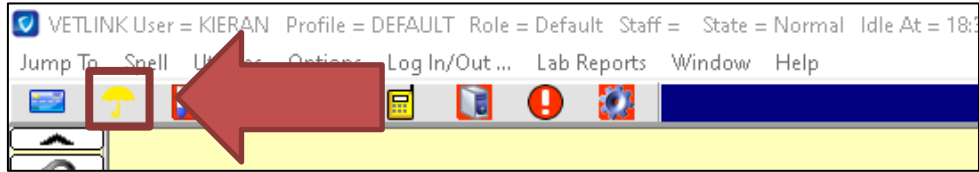
Date	TypeS	Amount	Reference
30/03/2022	Charge	\$300.00	
30/03/2022	Payment	\$20.00	On Bill# 1/815756
30/03/2022	Payment	\$180.00	On Bill# 1/815757
30/03/2022	Insurance Settlement	\$100.00	On Bill# 1/815758

Sub Total \$260.87  
GST \$39.13  
Total \$300.00  
Due \$0.00

By\_Ref Actions AF3 : Exit

## Viewing Claim Status / Previous Claims

- You can view the claims made and status of claims by either
  - Clicking the **Umbrella** icon in notification bar at top of screen.
  - 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
1/34	24/09/2020	Takapuna		GapOnly	Processing	Jennifer Greyer	Oscar	Dog	\$150.00	\$180.00	RS	40cc5353-4883-43fc	\$0.0
1/35	24/09/2020	Takapuna		eClaim	Processing	Mrs. Megan Hair	Pepper	Dog	\$0.00	\$125.92	RS	09a3d3e8-c8a6-48f	\$0.0
1/36	4/11/2020	Takapuna		GapOnly	Pmt Submitted	Jennifer Greyer	Oscar	Dog	\$172.00	\$236.07	RS	aa29b98c-b16b-4e	\$0.0
1/37	4/11/2020	Takapuna		GapOnly	Pmt Submitted	Jennifer Greyer	Oscar	Dog	\$98.00	\$141.66	RS	7f3978ae-5d5d-47e	\$0.0
1/38	25/03/2021	Takapuna		GapOnly	Awaiting Pmt	Jennifer Greyer	Oscar	Dog	\$350.00	\$436.07	OWN	4d5a174d-c0f4-442f	\$0.0
1/39	31/03/2021	Takapuna		eClaim	Submitted	Jennifer Greyer	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	0ab87c4f-4cb0-450f	\$0.0
1/49	13/04/2021	Takapuna		GapOnly	Submitted	Jennifer Greyer	Oscar	Dog	\$0.00	\$180.00	OWN	e1c30394-5ab9-4d5	\$0.0
1/50	22/04/2021	Takapuna		GapOnly	Submitted	Jennifer Greyer	Oscar	Dog	\$0.00	\$180.00	OWN	74921f6a-d985-494f	\$0.0
1/51	13/05/2021	Takapuna		eClaim	Submitted	Jennifer Greyer	Oscar	Dog	\$0.00	\$100.00	OWN	66d82564-178a-413	\$0.0
1/55	29/07/2021	Takapuna		eClaim	Submitted	Jennifer Greyer	Oscar	Dog	\$0.00	\$722.39	OWN	a4eab801-6866-401	\$0.0
1/78	29/09/2021	Takapuna		GapOnly	Settled	Jennifer Greyer	Oscar	Dog	\$150.00	\$180.00	OWN	f76653ef-e596-42f1-	1/817393 \$145.0
1/79	29/10/2021	Takapuna	Woolworths	eClaim	Submitted	Jennifer Greyer	Oscar	Dog	\$0.00	\$591.42	OWN	8539c910-84b1-453	\$0.0
1/76	20/08/2021	Takapuna		eClaim	Submitted	Jennifer Greyer	Oscar	Dog	\$0.00	\$120.00	OWN	d94a9c69-6e1e-437	\$0.0
1/77	20/08/2021	Takapuna		GapOnly	Submitted	Jennifer Greyer	Oscar	Dog	\$0.00	\$591.60	OWN	1876c467-a235-493	\$0.0
1/75	18/08/2021	Takapuna		eClaim	Submitted	Jennifer Greyer	Oscar	Dog	\$0.00	\$633.28	OWN	8e1b401f-262f-4b6d	\$0.0

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

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

- Use the filters at the top of the window to help search for a specific claim.
- 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	36	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

## GapOnly Insurance Payments with Xero Integration

With GapOnly integration with VetlinkPro the payment from GapOnly automatically downloads to VetlinkPro to Pay off the outstanding bill. This will then upload to Xero to pay invoice in Xero as well. However as GapOnly will also pay the approved amount into your bank you will also see the payment in your bank reconciliation in Xero. Because the payment will also upload from Vetlink apply apply to the bill you won't be able to reconcile it to the original invoice. Instead you will need to reconcile it to your Insurance Payment Method Account. To set this up and do reconciliation see steps below.

### Xero Insurance Payment Account Setup

1. Create a Insurance Payment Method Asset account in Xero and make sure you tick Enable Payments to this Account.
2. Let VetlinkPro know the account name and Code you have created so it can be added into VetlinkPro.

The screenshot shows the Xero account setup interface. On the left, the 'Account Type' is set to 'Current Asset', the 'Code' is '057' (with a note '057 is available'), and the 'Name' is 'Insurance Payment Method'. The 'Description' is empty. Under 'Tax', 'BAS Excluded' is selected, and the checkbox 'Enable payments to this account' is checked and highlighted with a red box. On the right, a preview shows how the account type affects reports, with 'NET PROFIT' highlighted in the Profit & Loss statement and 'Non-current liabilities' highlighted in the Balance Sheet.

### Reconciling in Xero

1. Find payment in in your bank reconciliation
2. Click create option.
3. Fill in who and why and set What to your insurance payment account

The screenshot shows the Xero reconciliation interface. On the left, a transaction is listed: '12 Mar 2024 GapOnly Bramel Payment' with a 'Spent' amount of '159.00'. An 'OK' button is next to it. On the right, the 'Create' tab is active. The 'Who' field is set to 'GapOnly', the 'What' field is set to '057 - Insurance Payme', and the 'Why' field is set to 'Gap Payment reconciliation'. There are also fields for 'Branch' and 'Add details'.

4. Click OK and Reconcile.
5. A entry will be made to the Insurance Payment Account to offset the payment uploaded from VetlinkPro.

#### Insurance Payment Method Transactions

[Reorder columns](#)

VLAUS01

For the period 1 March 2024 to 31 March 2024

Date	Source	Description	Reference	Debit	Credit	Running Balance	Gross	GST
<b>Insurance Payment Method</b>								
Opening Balance				-	-	-	-	-
12 Mar 2024	Receive Money	GapOnly - Gap Payment reconciliation		-	159.00	(159.00)	(159.00)	-
12 Mar 2024	Receivable Payment	Payment: Noel Bramel (C10000001008)	CFL: VL 10000001458 - Seq 10000000475	159.00	-	-	159.00	-
Total Insurance Payment Method				159.00	159.00	-	-	-
Closing Balance				-	-	-	-	-
Total				159.00	159.00	-	-	-