

INSURANCE

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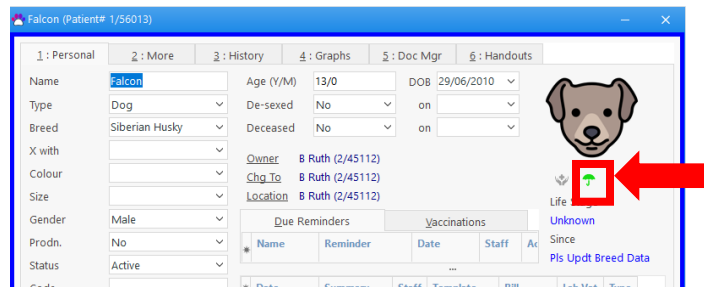
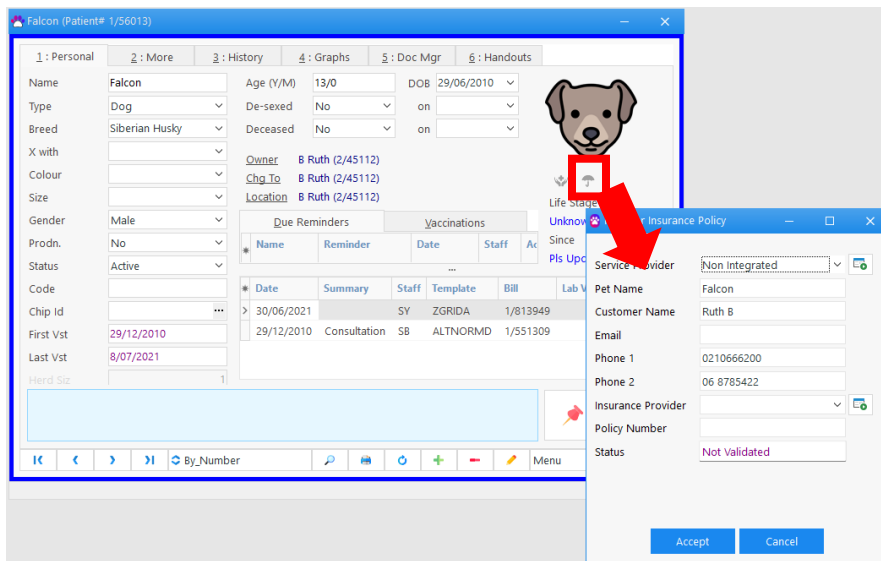
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NON INTEGRATED

Recording Insurance Details

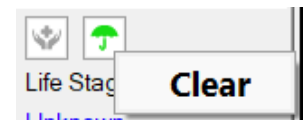
Patient Insurance details can be added from the patient record. To add the details:

1. Open the patient record.
2. Click the Insurance icon (Umbrella) on the right-hand side of the record or go to [Menu | 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™ claims and eclaims are both able to be sent from VetlinkPRO. For all integration enquiries please contact 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.

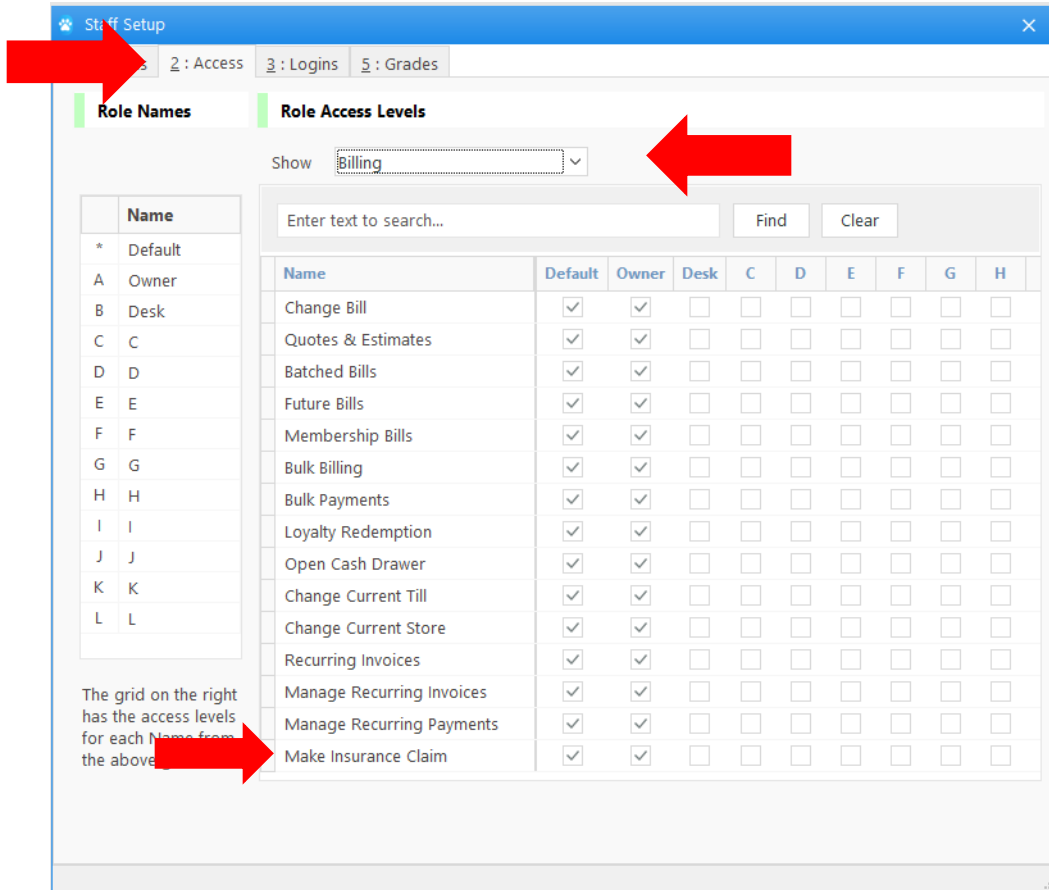
1. Contact PetSure to register for the integration.
2. VetlinkPRO will register the integration on their portal.
3. In VetlinkPRO go to [Options | Setup | Misc | 8: Internet tab | tick Enable PetSure Integration](#).
4. [Register the PetSure Account](#)
 - a. Go to [Options | Picklists | Suppliers | 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 Insurance Claims

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:

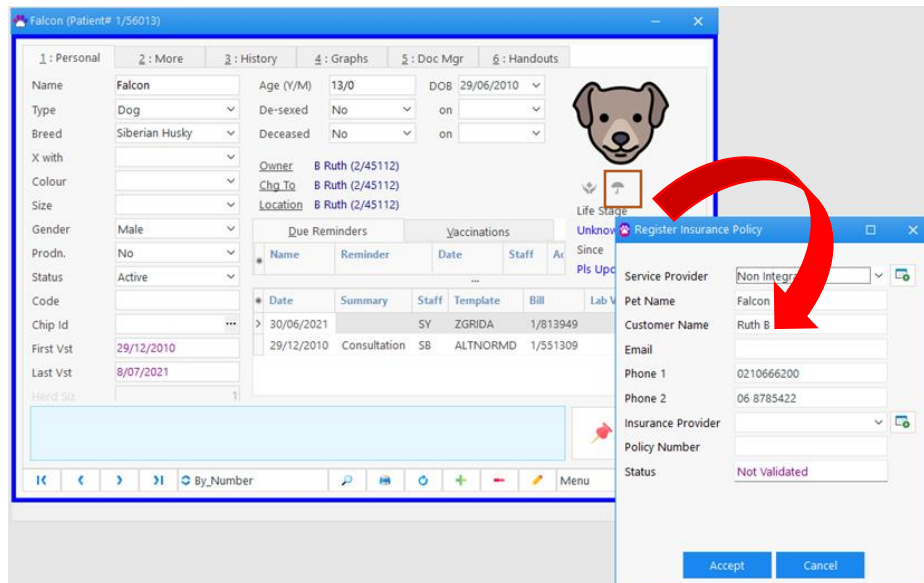
[Options](#) | [Setup](#) | [Log in with ID and Password](#) | [Staff](#) | [Access tab](#) | [Change Show to Billing](#) | [tick access levels that can Make Insurance Claims](#).

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 [Menu | 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 | Menu | Insurance | Claim**.
 - c. From **Account History button | search and open bill | Menu | Make Insurance Claim**.
 - d. From **Client Record | History tab | find and open bill | Menu | 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. Most details should automatically be filled in; however, the vet will need to be added and you can edit the details if needed.
4. Click **Next**.

The screenshot shows a web form titled "New Claim for Hulk (585) Bruce Banner (562)". The form contains the following fields and values:

Our Reference	934	Status	New	Claim Total	45.17	Client Paid	45.17
Claim Ref				Total Disc	0.00	Amt Claimed	45.17
Type	eClaim			Total Tax	5.89	Amt Approved	0.00

Policy Holder		Vet	
Name	Bruce Banner	Staff	Dr. Barbara Collins
Email		Position	Veterinarian
Daytime Phone	0412345678	Email	vetlink@cfl.co.nz
Evening Phone		Clinic/Branch	CFL Clinic
Mobile Phone	0412345678	Phone	Ph: 4892280
Address	21 Barrys Point Road Takapuna, Auckland 0622	Address	21 Barrys Point Road
Post Code	0622	Post Code	9999

Patient		Claim Handler	
Name	Hulk	Staff	Ms. Test Client
Species	Cat	Email	vetlink@cfl.co.nz
Breed	Korat	Phone	021 1649207
Dob	2023-02-06		
Microchip			
Provider	Bow Wow Meow		
Policy Number	BW00026781		

At the bottom of the form, there are three buttons: "Next", "Save & Exit", and "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**

The screenshot shows a software window titled "New Claim for Hulk (585) Bruce Banner (562)". At the top, there are input fields for "Our Reference" (934), "Status" (New), "Claim Ref", "Type" (eClaim), "Claim Total" (45.17), "Client Paid" (45.17), "Total Disc" (0.00), "Amt Claimed" (45.17), "Total Tax" (5.89), and "Amt Approved" (0.00). Below this is a "Treatment" section with fields for "First Noticed" (30/12/1899), "Treatment Start" (30/12/1899), and "Finish" (30/12/1899). There are also fields for "Diagnosis", "Complaint" (test), and "Notes" (test). At the bottom are buttons for "Back", "Next", "Save & Exit", and "Cancel".

Red arrows point to the following fields:

- 5a**: Points to the "First Noticed" date field.
- 5b**: Points to the "Finish" date field.
- 5c**: Points to the "Diagnosis" field.
- 5d**: Points to the "Complaint" text area.
- 5e**: Points to the "Notes" text area.

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.

This screenshot shows the same software window, but with the "Bill", "History", and "Attachments" sections expanded. The "Bill" section contains a table with one row of data. The "History" and "Attachments" sections are currently empty, each with a "+/-" button for expansion.

Num	Date	Sub Total	Disc	Tax	Total	Description
10637	2023-11-06	\$39.28	\$0.00	\$5.89	\$45.17	

Red arrows point to the "+" buttons in the following sections:

- Add Bills**: Points to the "+" button in the Bill section.
- Add History Notes**: Points to the "+" button in the History section.
- Add Attachments**: Points to the "+" button in the Attachments 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.

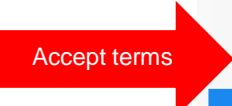
New Claim for Hulk (585) Bruce Banner (562)

Our Reference	<input type="text" value="934"/>	Status	<input type="text" value="New"/>	Claim Total	<input type="text" value="45.17"/>	Client Paid	<input type="text" value="45.17"/>
Claim Ref	<input type="text"/>	Total Disc	<input type="text" value="0.00"/>	Amt Claimed	<input type="text" value="45.17"/>		
Type	<input type="text" value="eClaim"/>	Total Tax	<input type="text" value="5.89"/>	Amt Approved	<input type="text" value="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

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

Making a GapOnly™ Claim

GapOnly™ Eligibility

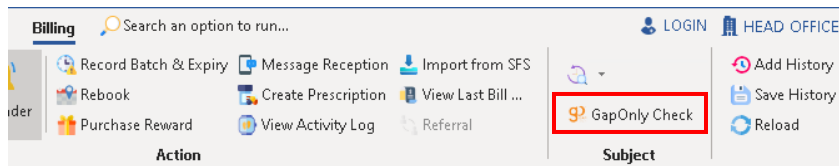
- Clinic must be registered for GapOnly™, please contact PetSure for details.
- Insurer must be GapOnly™ eligible.
- Insurance policy must be GapOnly™ eligible.
- GapOnly™ M claims can only be made on invoice not fully paid.

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.



While Making a Claim

Select GapOnly™ in the Type field while making a new claim.

New Claim for Hulk (585) Bruce Banner (562)

Our Reference	934	Status	New	Claim Total	45.17	Client Paid	45.17
Claim Ref	2dd92996-8bca-4f0a-a945-069c568e3a0c	Total Disc	0.00	Amt Claimed	45.17		
Type	GapOnly	Total Tax	5.89	Amt Approved	0.00		

Treatment

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 | Menu | Insurance | Claim | Change Type to GapOnly**
 - c. From **Account History button | search and open bill | Menu | Make Insurance Claim | Change Type to GapOnly**
 - d. From **Client Record | History tab | find and open bill | Menu | Make Insurance Claim | Change Type to GapOnly**

Note: To submit a GapOnly™ claim the bill must have some charged amount still due. This is using a payment method of either “Charge”, “Account”, “To Account”, or we may set up a separate payment method if requested named “GapOnly”.

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**.

New Claim for Hulk (585) Bruce Banner (562)

Our Reference	934	Status	New	Claim Total	45.17	Client Paid	45.17
Claim Ref				Total Disc	0.00	Amt Claimed	45.17
Type	eClaim			Total Tax	5.89	Amt Approved	0.00

Policy Holder		Vet	
Name	Bruce Banner	Staff	Dr. Barbara Collins
Email		Position	Veterinarian
Daytime Phone	0412345678	Email	vetlink@cfl.co.nz
Evening Phone		Clinic/Branch	CFL Clinic
Mobile Phone	0412345678	Phone	Ph: 4892280
Address	21 Barrys Point Road Takapuna, Auckland 0622	Address	21 Barrys Point Road
Post Code	0622	Post Code	9999

Patient		Claim Handler	
Name	Hulk	Staff	Ms. Test Client
Species	Cat	Email	vetlink@cfl.co.nz
Breed	Korat	Phone	021 1649207
Dob	2023-02-06		
Microchip			
Provider	Bow Wow Meow		
Policy Number	BW00026781		

Buttons: Next, Save & Exit, Cancel

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

The screenshot shows a web form titled "New Claim for Hulk (565) Bruce Banner (562)". At the top, there are input fields for "Our Reference" (994), "Status" (New), "Claim Ref", and "Type" (eClaim). To the right, a summary table displays financial values: Claim Total (45.17), Client Paid (45.17), Total Disc (0.00), Amt Claimed (45.17), Total Tax (5.89), and Amt Approved (0.00). The "Treatment" section contains several fields: "First Noticed" (30/12/1899), "Diagnosis", "Complaint" (test), and "Notes" (test). Red arrows labeled 5a through 5e point to these fields. At the bottom, there are buttons for "Back", "Next", "Save & Exit", and "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.

New Claim for Hulk (585) Bruce Banner (562)

Our Reference: 934 Status: New Claim Total: 45.17 Client Paid: 45.17
 Claim Ref: Total Disc: 0.00 Amt Claimed: 45.17
 Type: eClaim Total Tax: 5.89 Amt Approved: 0.00

Num	Date	Sub Total	Disc	Tax	Total	Description
10637	2023-11-06	\$39.28	\$0.00	\$5.89	\$45.17	

History: <No data to display> Attachments: <No data to display>

Buttons: Back, Next, Save & Exit, 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.

New Claim for Hulk (585) Bruce Banner (562)

Our Reference	<input type="text" value="934"/>	Status	<input type="text" value="New"/>	Claim Total	<input type="text" value="45.17"/>	Client Paid	<input type="text" value="45.17"/>
Claim Ref	<input type="text"/>	Total Disc	<input type="text" value="0.00"/>	Amt Claimed	<input type="text" value="45.17"/>		
Type	<input type="text" value="eClaim"/>	Total Tax	<input type="text" value="5.89"/>	Amt Approved	<input type="text" value="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.

Accept terms

Information

 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:

- Open the bill again by either:
 - Open **Client Record** -> Click **History** tab -> Open relevant bill.
 - Click **Account History** button and search for bill by date or bill number.
- Click **Patient Name** button for patient you are making claim for.
- Click **Menu** button at bottom of the bill and choose **Make Insurance Claim**
- 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 **Manage Insurance Claims** screen.



Taking Gap Payment

1. Use the Manage 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.

Number	Date	Branch	Provider	Type	Status	Client	Patient	Species	Approved	Claimed	Staff
1/842	31/07/2023	HEAD	Everyday Pet Ins...	GapO...	GAP Processing	Ms. Ann Mc Nabb	Gap Only Dog	Dog	\$200.00	\$213.92	BC
1/841	31/07/2023	HEAD	Everyday Pet Ins...	GapO...	GAP Processing	Ms. Ann Mc Nabb	Gap Only Dog	Dog	\$20.00	\$50.79	BC
1/840	21/07/2023	HEAD	Bow Wow Meow	GapO...	Awaiting Pmt	Mrs. Alley Grindle	Milo	Dog	\$67.50	\$84.38	BC
1/839	20/07/2023	HEAD	Bow Wow Meow	GapO...	GAP Processing	Bruce Banner	Thor	Cat	\$0.00	\$196.88	DP
1/838	20/07/2023	HEAD	Bow Wow Meow	GapO...	GAP Processing	Bruce Banner	Hulk	Cat	\$0.00	\$196.88	DC
1/836	20/07/2023	HEAD	Bow Wow Meow	GapO...	Pmt Submitted	Bruce Banner	Hulk	Cat	\$150.00	\$196.88	DP
1/835	20/07/2023	HEAD	Bow Wow Meow	GapO...	Settled	Bruce Banner	Thor	Cat	\$150.00	\$196.88	HC
1/834	20/07/2023	HEAD	Bow Wow Meow	GapO...	Settled	Bruce Banner	Hulk	Cat	\$150.00	\$196.88	GW
1/833	20/07/2023	HEAD	Bow Wow Meow	GapO...	Declined	Richard Grayson	Batman	Dog	\$0.00	\$196.88	GW
1/832	20/07/2023	HEAD	Bow Wow Meow	GapO...	Pmt Submitted	Richard Grayson	Batman	Dog	\$20.00	\$39.38	DC
1/831	20/07/2023	HEAD	Bow Wow Meow	GapO...	Pmt Submitted	Richard Grayson	Robin	Cat	\$150.00	\$196.88	DC
1/829	20/07/2023	HEAD	Bow Wow Meow	GapO...	Pmt Submitted	Richard Grayson	Batman	Dog	\$150.00	\$196.88	BC
1/828	14/07/2023	HEAD	Bow Wow Meow	GapO...	Settled	Mrs. Alley Grindle	Milo	Dog	\$0.00	\$497.22	BC
1/827	13/07/2023	HEAD	Prime	eClaim	Processing	Mrs. Jennifer Grayer	Oliver	Dog	\$0.00	\$17.04	BC
1/826	13/07/2023	HEAD	RSPCA	eClaim	Processing	Mrs. Kay Saph	Kobe	Dog	\$0.00	\$17.04	BC
1/825	7/07/2023	HEAD	Bow Wow Meow	GapO...	Settled	Ms. Petronia Dowdeswell	Indigo	Dog	\$100.00	\$196.88	HC
1/824	7/07/2023	HEAD	Bow Wow Meow	GapO...	Settled	Ms. Petronia Dowdeswell	Milo	Dog	\$100.00	\$196.88	HC

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 - Incentive Discount will Expire on 20/8

3 Mth +	\$0.00	Owed On Last Statement	\$0.00
2 Mth	\$0.00	Charged Since	\$0.00
1 Mth	\$581.60	Paid Since	-\$764.02
Current	\$0.00	Incentive Disc Pending	\$0.00
Total Owing	\$581.60		

Incentive Discount \$0.00
Amount to Pay \$84.38

* Date	Desc	Total	Outstanding	Allocation
> 21/07/2023	Invoice 10430 *	\$84.38	\$84.38	\$16.88

Pay All Invoices Clear Allocation

Invoices on open payments are excluded from the list.
* Insurance claim lodged, pay due unclaimed amount only.

Amount to Pay \$16.88

Accept Cancel

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**.

Note: You can only use credit to pay the entire Gap amount. If you want to make a part payment using credit, you will need to first make an account payment for the remainder of the Gap, then allocate the credit to the claim using the steps above

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”.

Staff	Qty	Description	Sell (Incl.)	Price (Incl.)	Batch	BP	Disc (Incl.)	Expiry Date	Department
O...		Payment towards Insurance 823	\$0.00	\$0.00		0	\$0.00		
O...		for Milo	\$0.00	\$0.00		0	\$0.00		
O...		1> Payment for Invoice# 1/10002	\$130.00	\$130.00		0	\$0.00		
O...	1	1> Insurance Fees	-\$5.00	-\$5.00		0	\$0.00		

Date	Type	Amount	Reference
7/07/2023	Insurance Paymen	\$125.00	

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

Staff	Qty	Description	Sell (Incl.)	Price (Incl.)	Batch	BP	Disc (Incl.)
BC		For Milo	\$0.00	\$0.00		0	\$0.00
BC	1	1> Cat Abcess Lance Stkg	\$196.88	\$196.88		0	\$0.00

Date	Type	Amount	Reference
7/07/2...	Charge	\$393.76	
7/07/2...	Payment	\$113.76	On Bill# 1/10003
7/07/2...	Insurance Settlement	\$130.00	On Bill# 1/10004
7/07/2...	Insurance Settlement	\$150.00	On Bill# 1/10005

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. Going through **Utilities | Manage Insurance Claims**



* Number	Date	Branch	Provider	Type	Status	Client	Patient	Species	Approved	Claimed	Staff
1/842	31/07/2023	HEAD	Everyday Pet Ins...	GapO...	GAP Processing	Ms. Ann Mc Nabb	Gap Only Dog	Dog	\$200.00	\$213.92	BC
1/841	31/07/2023	HEAD	Everyday Pet Ins...	GapO...	GAP Processing	Ms. Ann Mc Nabb	Gap Only Dog	Dog	\$20.00	\$50.79	BC
> 1/840	21/07/2023	HEAD	Bow Wow Meow	GapO...	Awaiting Pmt	Mrs. Alley Grindle	Milo	Dog	\$67.50	\$84.38	BC
1/839	20/07/2023	HEAD	Bow Wow Meow	GapO...	GAP Processing	Bruce Banner	Thor	Cat	\$0.00	\$196.88	DP
1/838	20/07/2023	HEAD	Bow Wow Meow	GapO...	GAP Processing	Bruce Banner	Hulk	Cat	\$0.00	\$196.88	DC
1/836	20/07/2023	HEAD	Bow Wow Meow	GapO...	Pmt Submitted	Bruce Banner	Hulk	Cat	\$150.00	\$196.88	DP
1/835	20/07/2023	HEAD	Bow Wow Meow	GapO...	Settled	Bruce Banner	Thor	Cat	\$150.00	\$196.88	HC
1/834	20/07/2023	HEAD	Bow Wow Meow	GapO...	Settled	Bruce Banner	Hulk	Cat	\$150.00	\$196.88	GW
1/833	20/07/2023	HEAD	Bow Wow Meow	GapO...	Declined	Richard Grayson	Batman	Dog	\$0.00	\$196.88	GW
1/832	20/07/2023	HEAD	Bow Wow Meow	GapO...	Pmt Submitted	Richard Grayson	Batman	Dog	\$20.00	\$39.38	DC
1/831	20/07/2023	HEAD	Bow Wow Meow	GapO...	Pmt Submitted	Richard Grayson	Robin	Cat	\$150.00	\$196.88	DC
1/829	20/07/2023	HEAD	Bow Wow Meow	GapO...	Pmt Submitted	Richard Grayson	Batman	Dog	\$150.00	\$196.88	BC
1/828	14/07/2023	HEAD	Bow Wow Meow	GapO...	Settled	Mrs. Alley Grindle	Milo	Dog	\$0.00	\$497.22	BC
1/827	13/07/2023	HEAD	Prime	eClaim	Processing	Mrs. Jennifer Grayer	Oliver	Dog	\$0.00	\$17.04	BC
1/826	13/07/2023	HEAD	RSPCA	eClaim	Processing	Mrs. Kay Saph	Kobe	Dog	\$0.00	\$17.04	BC
1/825	7/07/2023	HEAD	Bow Wow Meow	GapO...	Settled	Ms. Petronia Dowdeswell	Indigo	Dog	\$100.00	\$196.88	HC
1/824	7/07/2023	HEAD	Bow Wow Meow	GapO...	Settled	Ms. Petronia Dowdeswell	Milo	Dog	\$100.00	\$196.88	HC

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	Claim settled and money in account.
Declined	Claim declined by insurance company
Cancelled	Claim Cancelled.
Error	Error happened (Contact VetlinkPRO).

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.

- From the claim details click **Next** at the bottom of form to see the Notes, Bills, History Notes and attachments that were sent.

Claim for Gap Only Dog (563) Ms. Ann Mc Nabb (546)

Our Reference	894	Status	GAP Processing	Claim Total	67.04	Client Paid	34.04
Claim Ref	4208b43-6c9f-45b1-97be-bdaec81d0bff	Total Disc	0.00	Amt Claimed	67.04		
Type	GapOnly	Total Tax	8.74	Amt Approved	33.00		

Policy Holder		Vet	
Name	Ms. Ann Mc Nabb	Staff	Dr. Barbara Collins
Email	annm@gaponly.com.au	Position	Veterinarian
Daytime Phone	0455455518	Email	vetlink@cfl.co.nz
Evening Phone		Clinic/Branch	CFL Clinic
Mobile Phone	0455455518	Phone	Ph: 4892280
Address	123 Test St Melbourne, Melbourne 3000	Address	21 Barrys Point Road
Post Code	3000	Post Code	9999

Patient		Claim Handler	
Name	Gap Only Dog	Staff	Dr. Barbara Collins
Species	Dog	Email	vetlink@cfl.co.nz
Breed	Airedale Terrier	Phone	
Dob	2019-12-22		
Microchip	0000456345634		
Provider	Everyday Pet Insurance		
Policy Number	WW04490724		

Next Close

Click Next to see bills/history sent

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 the 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 VetlinkPro already applied 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 an 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.

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

4. Click OK and Reconcile.
5. An 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
Insurance Payment Method								
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	-	-	-