

eClaims

18/03/2026 1:08 pm GMT

Summary

VetXML eClaims allows a practice to communicate digitally to an insurance company and track the status of the claim once sent. Get the latest list via Petios

Details

Creating an eClaim

Preparation

Before creating a claim, the patient will need to have the insurance plan and policy number registered in the patient details screen. This will speed up the process when sending a claim but can be added in when sending the claim itself.

The screenshot shows a software interface with a top navigation bar containing icons and labels for 'Patient Details', 'Notes', 'Reminders', 'Lab Result', 'Weight Chart', 'Reminder Letters', and 'Referral Prac'. Below this is a 'Patient' section with a grid of input fields. The fields are organized into two columns. The left column contains: Patient Category (dropdown: * Small Animal), Name (* Milo), ID (1266760), Species (dropdown: * Canine), Breed (* Cocker Poodle), Colour (dropdown: Cream), Gender (dropdown), and Preferred Surgeon (dropdown). The right column contains: Last Visit (27/03/2025), Registered (08/02/2022), Date Of Birth (06/03/2014) with an 'Enter Age' button, Age (11 Years 1 Month 22 Days old), Weight (10 Kg), Deceased (checkbox), Insurance Plan (dropdown: ASDA), and Policy No (123456).

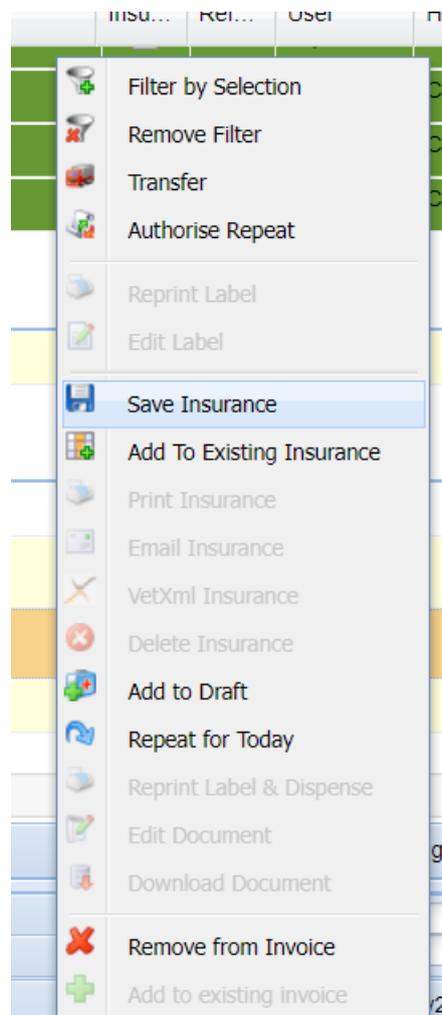
Patient			
Patient Category	* Small Animal	Last Visit	27/03/2025
Name	* Milo	Registered	08/02/2022
ID	1266760	Date Of Birth	06/03/2014 <input type="button" value="Enter Age"/>
Species	* Canine	Age	11 Years 1 Month 22 Days old
Breed	* Cocker Poodle	Weight	10 Kg
Colour	Cream	Deceased	<input type="checkbox"/>
Gender		Insurance Plan	ASDA
Preferred Surgeon		Policy No	123456

Note: You can only send eClaims to companies registered with Vet Envoy

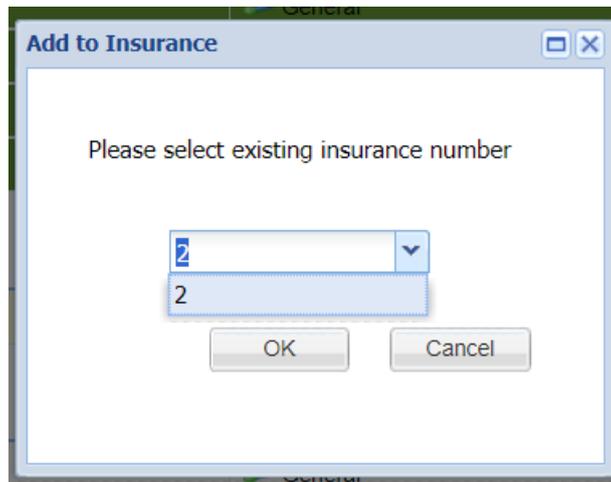
Creating an insurance claim

1. Search for and Select your Client and Patient.
2. Double Click on the Patient to access their treatment history
3. Use the insurance column, ticking the insurance checkbox for any insurance items within the treatment history

	Date	Time	Description	Clinical Code	Qty	Total	Surgeon	Site	Insu...	Ref...	User	HCP
	07/05/2024	10:13	Consult Nurse (Health Plan Discount)	General	1	-8.01	Elle Lightowler (EL)	Esher			Jupiter	Consu...
	07/05/2024	15:57	Consult Nurse	General	1	16.01	Elle Lightowler (EL)	Esher			Jupiter	Consu...
	07/05/2024	15:57	Consult Nurse (Health Plan Discount)	General	1	-8.01	Elle Lightowler (EL)	Esher			Jupiter	Consu...
TOTAL						80.03						
Date: 15/05/2024												
	15/05/2024	16:31	Document Created - Cascade Consent.docx	General	1	0.00	Tom Smith (a)	Esher			Jupiter	
TOTAL						0.00						
Date: 13/06/2024												
	13/06/2024	13:41	Test tx	General	1	25.00	All Matorian (AM)	Esher			Jupiter	
	13/06/2024	15:21	Book BOOSTER around 04/07/2024 to see T Pointer (TPointer) for 15 minutes	General	0	0.00	T Pointer (TPointer)	Esher			Jupiter	
	13/06/2024	13:39	Consultation Consultation 1	General	1	64.03	All Matorian (AM)	Esher			Jupiter	
	13/06/2024	15:21	Consultation 1	General	1	64.03	T Pointer (TPointer)	Esher			Jupiter	
TOTAL						153.06						



4. Rick-click and select 'Save Insurance'. This will assign the item to an insurance number. Multiple items can be added to the same number to then create the full claim.
5. If you miss an item off and need to add other treatments into the same claim, select 'Add to existing insurance' and select the appropriate number from the drop down.



5. Once ready, right-click and select 'VetXML Insurance'.



6. The 'Send VetXML Insurance' window opens.

The screenshot shows a window titled "Send VetXml Insurance". It contains the following fields and options:

- Patient Name: Harry
- Insurance Number: 1
- Insurance Company: Pet Plan (dropdown menu)
- Policy Number: 111424500
- Claim Continuation:
- Pay Vet:
- Claim Reason / Diagnosis: (empty text area)
- Buttons: Send, Cancel

7. The patient details and insurance number are there for reference. The Insurance Company & Policy number will be populated if already in the patient details. If not, these can be manually added at this point.
8. The option 'Claim Continuation' can be ticked if this is a follow on claim that extends a previous submitted claim.
9. The option 'Pay Vet' can be ticked to indicate that the insurance company should pay the practice the money rather than the client.
10. Enter the 'Claim Reason/ Diagnosis' into the text field to give an overview of what the claim is for.
11. Select the 'Send' button to start the eClaim.
12. Once sent, a line will be added to the patient history for reference.

How to monitor an eClaim.

1. Navigate to Integrations > VetXML
2. Select the 'Insurance Claim' service type from the menu on the left.
3. The VetXML module screen shows you a list of eClaims that have been made.

VetXml [User - jupiter : Site - Esher : Profile - Reception]

Service Types Status In Process Site: All Description Refresh Only show claims with unread messages

Service Type	Site	Completed	Description	Recipient	Last Updated	Created	Status
1 Claim	1101	✘	Tilly, Jones 12580-1: Fly Strike	Test Insurance	29 Mar 2011 13:45:...	29 Mar 2011 13:45:...	Posted claim is awaiting collection by Insurance Company
2 Claim	1101	✘	Jodie, Coles 12926219-1: Operation due ...	Test Insurance	29 Mar 2011 13:46:...	29 Mar 2011 13:44:...	An attempt to download the claim has been made by the Insurance Company, not yet received confirmation that this
3 Claim	1101	✘	Max, Legg 123112-4: Lab Work for Diets	Test Insurance	29 Mar 2011 13:51:...	29 Mar 2011 13:49:...	Claim is being processed by Insurance Company
4 Claim	1101	✘	Max, Legg 123112-3: Ongoing weight clinic	Test Insurance	29 Mar 2011 13:51:...	29 Mar 2011 13:48:...	Claim is being processed by Insurance Company
5 Claim	1101	✘	Minnie, Isitt 1154863-3: Direct Claim	Test Insurance	29 Mar 2011 13:56:...	29 Mar 2011 13:38:...	Claim has been declined
6 Claim	1101	✘	Tiggy, Loader 1159690-1: Leg Injury	Test Insurance	29 Mar 2011 14:52:...	29 Mar 2011 13:39:...	Claim has been settled

- This screen can be filtered by status/site and description.
- The details section is displayed at the bottom of the screen; this will show more information for the selected eClaim regarding status updates with date and time stamps.

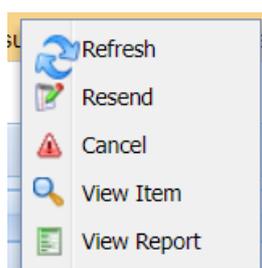
Details for the above selected record

Activity (7) Discussions (0) Attachments (0) Batches (0)

Status	Last Updated (Desc)
1 Conversation has not started	29 Mar 2011 13:39:45
2 New insurance claim has been generated	29 Mar 2011 13:39:46
3 Posted claim is awaiting collection by Insurance Company	29 Mar 2011 13:39:50
4 An attempt to download the claim has been made by the Insurance Company, not yet received confirmation that this was successful.	29 Mar 2011 13:40:10
5 Download of claim has been confirmed by the Insurance Company	29 Mar 2011 13:40:32
6 Claim is being processed by Insurance Company	29 Mar 2011 13:43:31
7 Claim has been settled	29 Mar 2011 14:52:20

labelling="Section-Header">Cancelling an eClaim.

- In the VetXML screen, right-click on the eClaim that you wish to cancel. *Note: This can only be done if the claim has not began being processed by the insurance company.*
- Select the 'Cancel' option.



The Insurance Company will be notified that the eClaim has been cancelled.

labelling="Section-Header">View an eClaim

- In the VetXML screen, right-click on an eClaim and select 'View Item'.



2. A window will open to show you the data contained within the eClaim request. The data will include the practice, patient and client details, full clinical history and financial details of the items being claimed for. This information is for reference only and is based upon the information entered within Merlin when the claim is made.

CLAIM DETAILS	
Condition	
Condition code	
Diagnosis / signs	Leg Injury
Claim continuation	
Claim reference number	1159690-1
Started	2006-11-09
Treatment dates	2006-11-09 to 2006-11-09
Death or euthanasia	No
Put down by recommendation	
Ongoing condition	
Seen before related	Description: Treatment dates: to
House visit	Reason:
Out- of-hours	Reason:
Financial	Total (ex VAT): £ 83.06 VAT: £ 14.54 Total (inc VAT): £ 97.6
	2006-11-09 CONSULT INITIAL Consultation 1,007,530 £ 27.02
	2006-11-09 MILBEMAX TABS FOR CATS Antiparasite 1,007,530 £ 23.76
	2006-11-09 STRONGHOLD 45MG X 6 CAT Antiparasite 1,007,530 £ 32.28

Discussions on eClaims

A Discussion is similar to sending an email about the eClaim. They are in two parts, a sent message and a response message, both of these parts need to take place for the discussion to complete.

A discussion can start from either the practice or the insurance company's side.

Incoming message started by the insurance company.

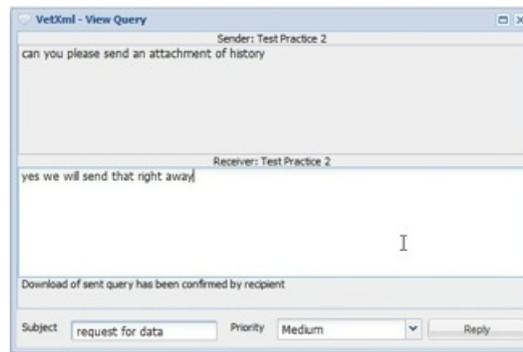
After the insurance company has downloaded the eClaim, they can start a new discussion.

A Discussion will show in the discussions tab in the details area, a number indicates how many discussions are on that eClaim.



1. Select the 'Discussions' tab.
2. The grid shows a subject, priority, the recipient company, last updated date and the discussions last

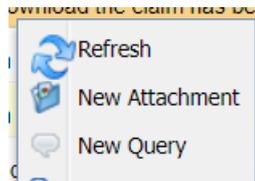
- 1) The grid shows a subject, priority, the response company, last updated date and the discussion last status.3) Right-click 'View query', the Query panel is then displayed.4) You are able to type back a reply in the text field and then press the 'Reply' button.



Outgoing message started by the practice.

Provided that the insurance company has downloaded the eClaim you may start a new discussion with the insurance company.

1. Right click on the eClaim and select 'New Query'.



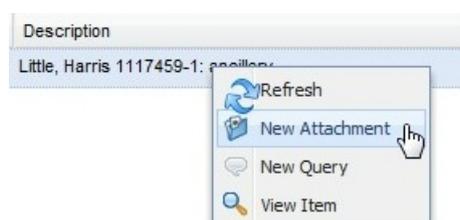
2. Enter text into the field provided.
3. Select 'Send', it will then be listed under discussions for that eClaim.

Attachments on eClaims.

It is possible to upload files to the insurance company to help with the processing of an eClaim.

To send an attachment the item needs to already be an attachment on the Patient's history.

1. In the VetXML module, right-click on the eClaim and select 'New Attachment'.2) The available attachments on the patients history will then be displayed, select the relevant items and select 'Attach'.



Item Date	Description	File Name	Docum...	Document It...
	Document Created - Admission & Conset For...		91796	
	Letter - Insurance claim 3 for patella luxation left		91889	
	Letter - Insurance Company		92002	
	Document Created - Admission & Conset For...		90610	
	Document Created - Admission & Conset For...		90782	
	Document Created - Admission & Conset For...		90784	
	Document Created - Admission & Conset For...		90785	

3. The insurance company will then be notified of the attachment sent from Merlin.

Once a claim is complete, the status within VetXML will be updated. This information will not transfer to the patient history so users will need to manually add a clinical note if they want this information of a complete claim to display in the history.
