

VetEnvoy and Insurance Claims

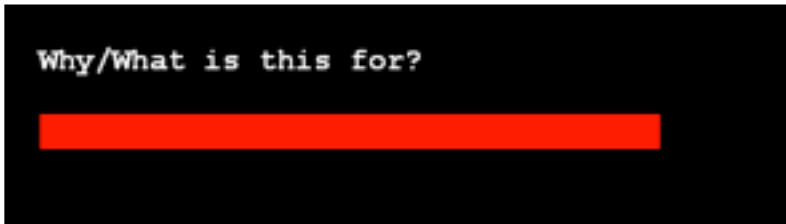
Adding Work	2
Start A New Case	2
Continue an existing condition	2
Treat Ad-Hoc	2
Using an AP code to start a case	2
During treatment	3
Changing Condition	3
Renaming Condition	3
Entering Diagnosis	3
Allocating old work	3
Ending Condition	4
Re-Opening a Condition	4
Adding to Claim Manager	4
Processing a claim	4
Insurance Manager	5
To be Started	5
Been Settled / Declined	5
With Insurance Company	6
Query on	6
Appendix 1 - Setup	7
Appendix 2 - Automatic Pricing Codes	8
Appendix 3 - Required Protocols	10
Appendix 4 - Params.txt Entries	11
Appendix 5 - VetEnvoy Polling	11

Adding Work

Assuming the system has been set correctly, when you go into Auto on the client card you will get a pop-up box:

From here you can select to:

Start A New Case



Enter a brief note of the condition, this will be used as the Diagnosis (unless you use the AP code INSDIAG prior to submission).

Continue an existing condition

A screenshot of a terminal window showing a list of open conditions. The text is displayed in a monospaced font with a red background for the first row and a grey background for the second row.

Green Spot	Open	TOM	02.02.2010
Blue Spot	Open	TOM	02.02.2010

A list of all open conditions will be displayed to allow you to select as appropriate.

Treat Ad-Hoc

In the case of toys, books and work NOT related to the animal's condition or treatment, the Ad-hoc option can be used. Work entered this way cannot be allocated to any condition.

In all three cases carry on adding work as normal.

Using an AP code to start a case

Normally you will use the above automatic procedure to start a case however, one you have quit this it will not re-run until the card as been exited. If you have picked Auto by mistake and then want esc, look at history etc. you will need to use the AP code INSUAD which does the same.

During treatment

Changing Condition

The client may whilst you are in treating their animal for condition 1 want advice or work on another condition. Use the AP code (see appendix 2) INSSW to switch conditions. When this code is used the current work will be assigned to condition 1 and further work will be allocated to the next condition.

Renaming Condition

The reason for the visit will be used as the default diagnosis for the insurance claim and be the text that is shown when selecting conditions. You may want to change this. Use the AP code (see appendix 2) INSSW, the 2nd option will allow you to re-name the current condition. For more control over the diagnosis see 'Entering Diagnosis' below.

Entering History

At some point **PRIOR** to submitting the claim you will need to enter some history about the animal. While at preset this is not mandatory it will become so - as such you should get into the habit of entering it.

By default, the system will look for any 'Text' entered against this condition - this may not always be a good idea as some comments entered may not be appropriate to forward to the Insurance company.

We suggest you use the AP code INSHIST (See below) to differentiate between general comments and comments about the condition.

There is NO limit on the number of times this AP code can be used - all will be included.

Entering Diagnosis

As with entering history, the default diagnosis (name of the condition) may not be suitable or descriptive enough - use the AP code INSDIAG (See below) to enter more details.

Allocating old work

If you have used the Ad-Hoc option and at a later point want to allocate that work then. Use the Edit option, Select 'Transaction', you will be a box listing all conditions for this animal - select one. Select the Record to change and press select Transaction - repeat selecting lines till you have changed all as required. You cannot in this release alter a line with an existing transaction - only lines un-allocated.

Ending Condition

If you are happy the animal has finished it's course of treatment and you do not expect to see it again for the same condition you can close the case. Use the AP code INSCCL (See below) this will mark the case as finished and add this to the Insurance manager.

Re-Opening a Condition

If you have ended the condition a little early and you want to re-open it. Use the AP code INSREO (See below) this will alter the status from Closed to Open allowing more work to be allocated against it. The system will keep track of what has been claimed so far and only submit work from this point onwards.

Adding to Claim Manager

If you are finished with the work to date and want to submit a claim (or pass it to the attention of the claims manager) use the AP code INSUC (See below).

Processing a claim

We will look at the Insurance Manager a little later, it will show you a list of claims that need processed. It does not matter how the claim is started you do need to use the Clinical Report screen on the animal's clinical screen.

To generate a claim use Clinical History report 22.

When this is run the system will ask some additional questions. The questions asked may change over time, these are questions the Insurance Company require.

The system will then look at the work entered and list this on the screen.

You are then given the option to review the details - this will send a copy of what is about to be submitted either to the printer or an E-Mail address. The Print/Email options are for checking purposes NOT as a method to submit a claim. Once you are happy you can send the claim via VetEnvoy.

The system will log when a report is sent to the Insurance Company - if you attempt to re-send the report you will be prompted:

Claim already submitted: **Re-run** **Continue** **Quit**

- **Re-Run** will ignore the previous claim and process it from the start date
- **Continue** - this will be treated as a continuation, only new work added/done (since last claim date) will be included.
- **Quit** exits and returns to menu.

A copy of the details will be saved as an attachment and can be viewed either via the attachment screen or it can be looked at via an Insurance Manager option.

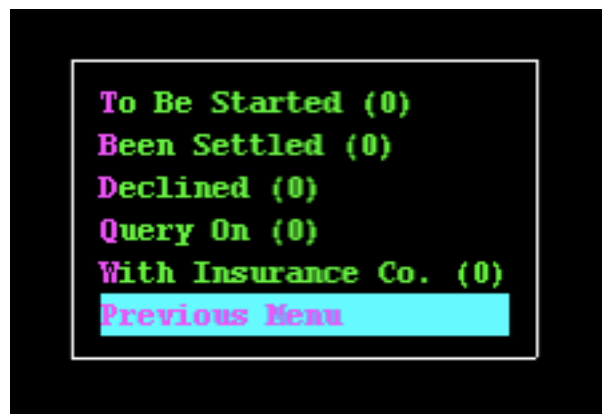
Once a claim has been submitted it is managed via the Insurance Manager.

Insurance Manager

The VetEnvoy option is on the reports sub-menu protected (access permission 149). This option will cover all VetEnvoy related tasks. At present only the Insurance Manager is available.

On **Reports** -> **VetEnvoy** option protected by access permission 150.

This manager allows you to see what state various claims are at. When selected you will get the options:



The format of the options are all the same, the menu option gives you an idea of what it relates to and the number in brackets () is the number of claims at that state.

To be Started

Add work as normal, when ready use AP code (INSUC) this will add an entry to the Insurance Manager as 'Waiting to start' - this step is optional - you can just start a claim via Clinical History option 22.

The Insurance Manager option will show you the records that need processed:

Claim	Record	Date	Client	Animal
300	04.01.2010	Welshman, Ms S	/Fudge	
400	04.01.2010	Holmes, E Mr	/Shep	

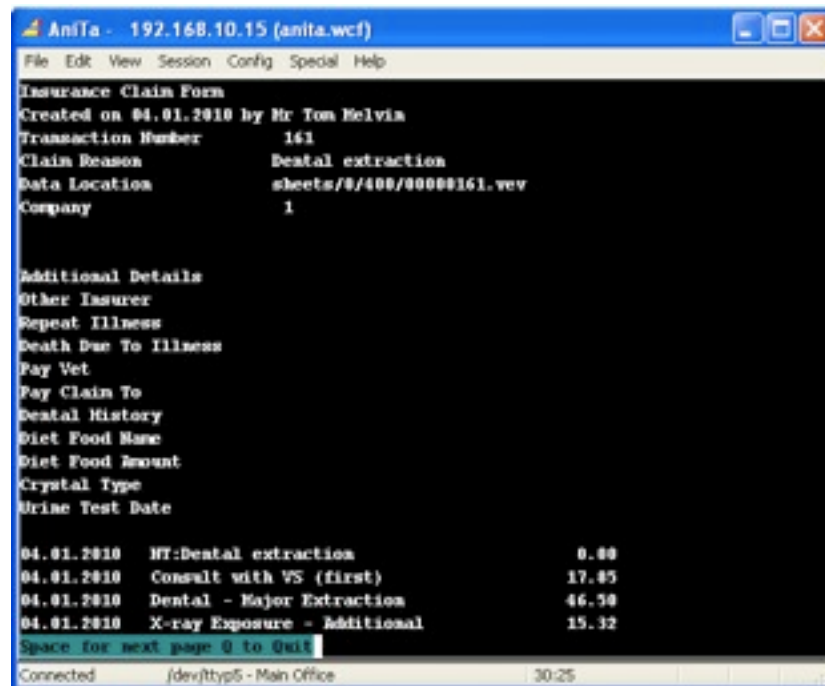
Been Settled / Declined

The claim will be processed by the insurance company and they can respond in two ways - they can settle it or decline it. The system is periodically checking the status of the claims and the Insurance Manager is updated.

When you select a claim on either of these options you will have the options:

Transaction: Do What? **C**laim **D**etails **N**ull **A**cknowledge **Q**uit

- **C**laim - Display on the screen the important details regarding the claim e.g.



- **D**etails - details of all communication between VetEnvoy and Premvet regarding this claim.
- **N**ull - This is the option to cancel the claim and tell VetEnvoy to forget all about it.
- **A**cknowledge - Once VetEnvoy has signified the claim has been settled (or declined) you have to confirm this - the Acknowledge stage is the final step in the claim - once Acknowledged the claim will be removed from the Insurance Manager.

With Insurance Company

At this point the claim is being processed by the Insurance Company - it's in the system. The options are similar to Settled/Declined above except you do not have the Acknowledge option.

Query on

If the Insurance Company has a query they may send a basic message asking for more details or clarification. This section will show any such claims, you have two new options:

- **G**et Query - Will contact VetEnvoy and display the query details
- **S**end - Send a message back.

Appendix 1 - Setup

Support will perform the initial setup for you.

Claim Handler	The name of the member of staff that is responsible for claim processing
Claim Phone	The Telephone number the Insurance company can use to contact the claim handler.
Claim EMail	The E-Mail address the insurance company can use regarding claims. We would recommend a mail alias is used for this.
Notify EMail	Mail address used if the system has problems with the operation of the system. Default: vetenvoy
Evening Phone Number	On the list of telephone numbers if you have allocated one of them to the Client's evening number then we need to know which number
Practice Postcode	Postcode of the practice
Practice Telephone Number	Practice telephone number
History Analysis Code	What analysis code are you using for entering history of the animal. (Optional - default text analysis code)
Signs Analysis Code	What analysis code are you using for entering preliminary diagnosis of the animal. (Optional - Transaction description)

Appendix 2 - Automatic Pricing Codes

You will need to set up the following AP codes:

Ask History -

Code:	INSHIST
Description:	Ask brief History
Extras:	^33=1 ^37=history

Ask Symptoms or Diagnosis (optional) -

Code:	INSDIAG
Description:	Ask brief Diagnosis
Extras:	^33=1 ^37=symptoms

End a case (No longer active) -

Code:	INSCL
Description:	Insurance Case (Closed)
Extras:	^33=1 ^37=insuend

Swap a case (Jump to a different condition) -

Code:	INSSW
Description:	Insurance Case (Switch)
Extras:	^33=1 ^37=insuswap

Add to Insurance Manager -

Code:	INSUC
Description:	Insurance Claim (To Be Started)
Extras:	^37=insuc

Start a case Manually (you have exited auto by mistake)

Code:	INSUAD
Description:	Insurance Claim (To Be Started)
Extras:	^33=1 ^37=insuadd

Re-Open a condition

Code:	INSREO
Description:	Re-Open a Condition
Extras:	^33=1 ^37=insureop

Appendix 3 - Required Protocols

All these are available automatically via the Update Server. Scripts with a pvaxxx in brackets are automatic and called by the system.

history.pro	Ask for a brief clinical history.
symptoms.pro	Ask for Symptoms (Optional)
insuadd.pro (pva017.pro)	Start a new Insurance Claim
insuswap.pro	Swap conditions mid-consult
insuend.pro	Close/Finish claim (Clinical work)
envoy.pro (pva015.pro)	Additional questions
tranlist.pro (pva013.pro)	List/Select condition
insuc.pro	Add to Insurance Manager

Transactions (Enabling Automatic Protocols)

VetEnvoy and Insurance work does make use of Transactions and these do need to be enabled. While there are various combinations possible the following will get you up and running.

Download protocol samples (Menu -> Help -> Check for Update -> Others -> Protocols

Edit **params.txt** to enable all automatic protocols with:

```
Call_Protocol = *
```

Switch to protocol folder and set the following automatic scripts as per:

```
cd protocols
cp envoy.pro      pva015.pro
cp insuadd.pro    pva017.pro
cp tranlist.pro   pva013.pro
```

This will set up basic transaction recording (for Vets and Nurse's only) and will exclude Farm cards.

Appendix 4 - Params.txt Entries

The **history** protocol will use the default text analysis code, it is a good idea to differentiate between text comments added in-house and those added relating specifically to the animal's condition.

Set **Protocol_Code_400 = xxx** (Where XXX is the analysis code you want to use)

When entering claims the system does need to know symptoms/diagnosis - it will use the name of the transaction. If you want more flexibility you can call this protocol - the default analysis code will be the same as the history one above - you will want to differentiate between them.

Set **Protocol_Code_401 = xxx** (Where XXX is the analysis code you want to use)

You need to enable the automatic protocols, rather than do individual ones use:

Call_Protocol = *

Appendix 5 - VetEnvoy Polling

Add an entry to vet cron as per:

```
* 6-22 * * * /usr/local/bin/vet -p poll
```

The polling is automatic and there is no need to set anything else up. At present you need to manually add the job it will be added to the Automation Manager in the next maintenance pack.