

eClaims

28/08/2025 12:23 pm BST

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 from [VetEnvoy Partners](#).

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.

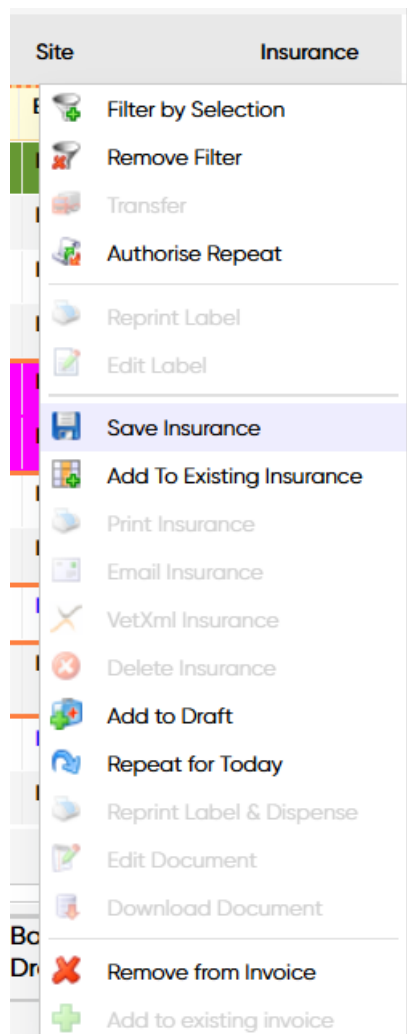
Patient Details	Notes	Reminders	Lab Result	Weight Chart	Reminder Letters
Patient					
Patient Category *	Small Animal	Last Visit	11/07/2025		
Name *	Morris	Registered	11/04/2025		
ID	1266592	Date Of Birth *	11/04/2020	Enter Age	
Species *	Canine	Age	5 Years 3 Months 7 Days old		
Breed *	Cross Breed (Miscellaneous)	Weight	10.6	Kg	
Colour		Deceased			
Gender	Neut Male	Insurance Plan	Pet Plan		
Preferred Surgeon		Policy No	123456		

Note: You can only send eClaims to companies registered with Petios.

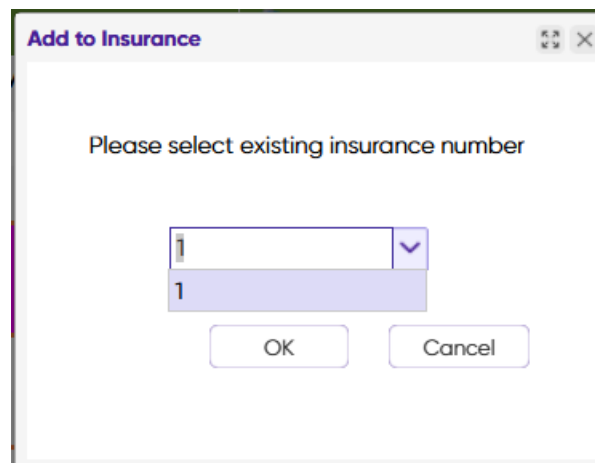
Creating an insurance claim

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.

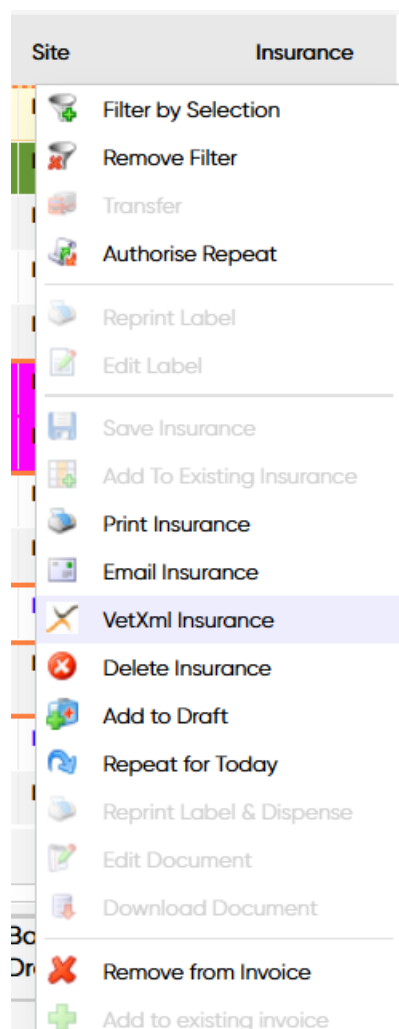
	Date	Time	Description	Clinical Code	Qty	Total	Surgeon	Site	Insurance
	13/07/2021	15:27	Abdocentesis	General	1	36.70	Jonathan Holloway (Jonathan)	Esher	<input checked="" type="checkbox"/>
	13/07/2021	15:27	Abdocentesis (Health Plan Discount)	General	1	-1.84	Jonathan Holloway (Jonathan)	Esher	<input checked="" type="checkbox"/>
	13/07/2021	15:27	1.5 / 2.0MM SMOOTH WASHER (Give 0 Tablets 0 Times Daily for 0 Days)	General	1	1.89	Jonathan Holloway (Jonathan)	Esher	<input type="checkbox"/>
	13/07/2021	15:27	Barrel Name Tag	General	1	13.30	Jonathan Holloway (Jonathan)	Esher	<input type="checkbox"/>
	13/07/2021	15:28	Cage Hire Per Week	General	1	10.00	Jonathan Holloway (Jonathan)	Esher	<input type="checkbox"/>
	01/04/2025	11:42	Consultation 1	General	1	45.00	Andrew Black (AB)	Esher	<input checked="" type="checkbox"/>
	01/04/2025	11:42	Consultation 1 (Health Plan Discount)	General	1	-45.00	Andrew Black (AB)	Esher	<input checked="" type="checkbox"/>
	09/05/2025	11:47	6 Monthly Dental Check	General	1	80.04	Andrew Black (AB)	Esher	<input type="checkbox"/>
	09/05/2025	11:47	Consultation 1	General	1	0.00	Andrew Black (AB)	Esher	<input type="checkbox"/>
	04/06/2025	10:38	Lab Request made for Endocrinology	General	1	0.00		Esher	<input type="checkbox"/>
	03/07/2025	16:18	ACP TABS 10MG 500 (Give 0 Tablets 0 Times Daily for 0 Days -- 123455 Expires: 01/04/2027 -- Must be given with food)	General	1	0.56	Andrew Black (AB)	Esher	<input type="checkbox"/>
	18/07/2025	15:52	Book Post Op Check around 18/07/2025 to see Andrew Black (AB) for 15 minutes	General	0	0.00	Andrew Black (AB)	Esher	<input type="checkbox"/>
	18/07/2025	15:52	Consult Nurse	General	1	20.00	Andrew Black (AB)	Esher	<input type="checkbox"/>



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 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.

Send VetXml Insurance

Patient Name:

Insurance Number:

Insurance Company: ▼

Policy Number:

☐ Claim Continuation ☒ Pay Vet

Claim Reason / Diagnosis

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.

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									
<div> <div>Activities</div> <div>Administration</div> </div>									
Service Types	Status	All	Site	All	Description		Refresh	Only show claims with unread messages	
Microchip Re...	Service Type	Site	Comple...	Description	Recipient	Last Updated	Created	Status	
Insurance Claim	1	Claim	1101	Tilly, Jones 12580-1: Fly Strike	Test Insurance	29 Mar 2011 13:45:50	29 Mar 2011 13:45:48	Posted claim is awaiting collection by Insurance Company	
Lab Report	2	Claim	1101	Jodie, Coles 12926279-1: Operation du...	Test Insurance	29 Mar 2011 13:46:10	29 Mar 2011 13:44:56	An attempt to download the claim has been made by the Insurance Company, not yet received confirmat...	
	3	Claim	1101	Ruby, Langdon 126941-1: Maintenance	Test Insurance	29 Mar 2011 13:46:54	29 Mar 2011 13:36:21	Insurance claim Complete - Claim has been settled	
	4	Claim	1101	Jess, Scoble 1159896-1: Long Illness	Test Insurance	29 Mar 2011 13:46:58	29 Mar 2011 13:38:07	Insurance claim Complete - Claim has been declined	

- 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									
<div> <div>Activity (8)</div> <div>Discussions (0)</div> <div>Attachments (0)</div> <div>Batches (0)</div> </div>									
Status								Last Updated (Desc)	
1	Conversation has not started							29 Mar 2011 13:36:21	
2	New insurance claim has been generated							29 Mar 2011 13:36:22	
3	Posted claim is awaiting collection by Insurance Company							29 Mar 2011 13:36:30	
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 13:36:42	
5	Download of claim has been confirmed by the Insurance Company							29 Mar 2011 13:39:50	
6	Claim is being processed by Insurance Company							29 Mar 2011 13:40:20	
7	Claim has been settled							29 Mar 2011 13:46:00	
8	Insurance claim Complete							29 Mar 2011 13:46:54	

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.

Refresh
Resend
New Attachment
Cancel
View Item
View Report

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

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.

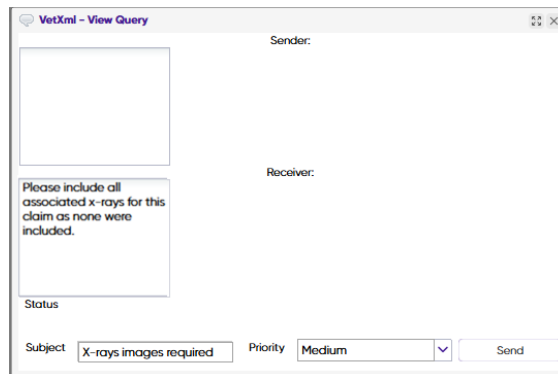
Incoming message started by the insurance company.

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.

Details for the above selected record	
Activity (4)	Discussions (0)
Attachments (1)	
Subject	Priority

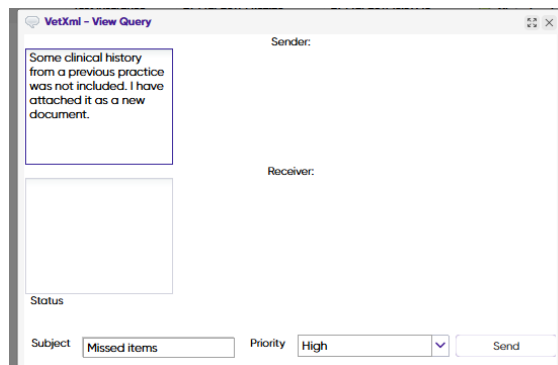
1. Select the 'Discussions' tab.
2. The grid will show a subject, priority, the recipient company, last updated date and the discussions last status.



1. 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'.

VetXml - Select Attachment				
Item Date	Description	File Name	Docum...	Document It...
	Document Created - ConsentForm_Max	VET_CONSENT_I7220_1233736585081_DOCUMENT.doc	69808	
	Document Created - Admission & Conset For...	VET_CONSENT_I7220_1246122449136_DOCUMENT.doc	79319	
	Document Created - Admission & Conset For...	VET_CONSENT_I7220_1253696183308_DOCUMENT.doc	81370	
	Lab Reports - 01378G	01378G.doc	81539	
<div>  Attach  Close </div>				

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.