trupanion express™ user guide

AVImark

Table of Contents

Introduction 1
About This User Guide 1
Getting Started 2
System Requirements 2
Installation Overview 2
Network Requirements 2
Practice Management System Compatibility 2
Server Compatibility (Agent only) 2
Browser Compatibility 3
Hardware Requirements 3
Supported Architectures 3
Minimum Disk Space (Agent only) 3
Microsoft .NET Framework 3
Installing the Trupanion Express Agent 3
Security and Internet Settings 3
Installation Process 4
Workstation Access 9
Authentication 9
Desktop Shortcut 9
Adding the Trupanion Payment Type to AVImark 11
Behind the Scenes of Trupanion Express 12
Refresh Intervals 12
Estimates 12
Invoices 12
Trupanion Express Overview 13
Resolution and Responsive Design 13
Navigation and Workflow 14
General Design 14
Trupanion Search 14
Main Menu 15
List Navigation 15
Help 17
Appointments 18
Pet Profile 20
Linking and Unlinking of Pets 21
Linking a Pet from Appointments 21
Linking a Pet from the Pets Page 22
Linking a Pet from the Start Claim Express Link 22

Trupanion is a registered trademark owned by Trupanion, Inc. Trupanion's policy is underwritten by American Pet Insurance Company (USA) and Omega General Insurance Company (Canada).

Unlinking a Pet from the Pet Profile 24
Trupanion Certificates 25
Offering a Certificate 25
Offering a Certificate from Appointments 25
Offering a Certificate from the Offer Certificate Express Link 27
Activating a Certificate 28
Checking Certificate Status 29
PawPrints 30
Green PawPrint 30
Orange PawPrint 31
Grey PawPrint 31
Trupanion Claims 32
Posting the Invoice 32
Submitting a Claim 33
Start the Claim 33
Pet Details 34
Review the PawPrint 34
Complete the Claim 35
Checking Claims Status 36
Adding the Trupanion Payment 38
Trupanion Pre-Approvals 39
Saving the Estimate or Posting the Invoice 39
Saving an Estimate 39
Posting an Invoice 39
Submitting a Pre-Approval 40
Start the Pre-Approval 40
Pet Details 41
Complete the Pre-Approval 41
Checking Pre-Approval Status 42
Impact Bar and Reporting 44
Impact Bar 44
Reports 44
My Finalized Paid Claims 45
My Claim EFT Payments 46
Daily Trupanion Payment Reconciliation 47
My Trupanion Pets 48
Training 49
Getting Help 50

Trupanion is a registered trademark owned by Trupanion, Inc. Trupanion's policy is underwritten by American Pet Insurance Company (USA) and Omega General Insurance Company (Canada).