

# Insurance - non VetXML

04/03/2025 8:46 am GMT

## Summary

Merlin has the ability to mark clinical items as insurance. Users are then able to print or email these directly from Merlin. If your practice uses VetXML for sending the insurance claims, further details can be found [here](#).

## Insurance Details

In the patients details screen there is a place to add the patients insurance details. This information will show on any documents that have the relevant [merge field](#). You can edit this page but using the 'Modify' button.

The screenshot shows the 'Patient [ User - jupiter : Site - Esher : Profile - Back Reception1 ]' screen. The top toolbar includes buttons for 'Add', 'Save Patient', 'Modify' (highlighted with a red box), 'Deactivate Patient', 'Clipper', 'Treatment', 'Lab Request', 'Make Appointment', and 'Transfer Patient'. Below the toolbar are tabs for 'Patient Details', 'Notes', 'Reminders', 'Lab Result', 'Weight Chart', 'Reminder Letters', 'Referral Practice', and 'First Opinion Practice'. The 'Patient Details' tab is active, showing fields for Patient Category (Small Animal), Name (Finn), ID (1266780), Species (Canine), Breed (Pharoah Hound), Colour (Ginger), Gender (Neut Male), Preferred Surgeon, Microchip No, Last Visit (23/10/2024), Registered (23/05/2022), Date Of Birth (05/10/2016), Age (8 Years 19 Days old), Weight (40 Kg), Deceased, Insurance Plan (Pet Plan), Policy No (123456789), Policy Start (01/01/2019), Case No, Yard Name, Yard Town, Yard Postcode, Additional Name 1-4, Passport Certified, Intended for food chain, and Discount Category. The 'Insurance Plan' section is highlighted with a red box. Below the main form are sections for 'Anti Parasitics' and 'Other Information'.

## Creating a Insurance Claim

1. Search for the client and patient in Reception.
2. Navigate to the [History](#) screen.

Treatment [ User - jupiter : Site - Esher : Profile - Back Reception1 ]

History Pre-Invoice Add Treatment Prescriptions Saved Estimates Documents Patients Client Notes Archive Health Care Plan

Filters: Description Clinical Code All Type All Reset Settings

Date	Time	Description	Clinical Code	Qty	Total	Surgeon	Site	Insu...	Ref...	Group	User	Modified	HCP
23/05/2022	14:21	Operation Castrate Dog	General	1	150.75	Tomasz Olszewski (to...	Esher				jupiter	23/05/2022	
23/05/2022	14:21	Injections Stock Propofo Per Mi (A059A02 Expires: 31/07/2022)	General	1.5	2.41	Tomasz Olszewski (to...	Esher				jupiter	23/05/2022	
TOTAL					153.16								
Date: 09/06/2022													
09/06/2022	10:49	History - Bright alert responsive the dog is very bouncy and cute	General	0	0.00	T Pointer (TPointer)	Esher				jupiter	09/06/2022	
09/06/2022	10:49	Book CONSULTATION around 25/Jun/2022 to see T Pointer (TPointer) for 10 minutes	General	0	0.00	T Pointer (TPointer)	Esher				jupiter	09/06/2022	
09/06/2022	10:48	Consultation Consultation 1	General	1	92.40	T Pointer (TPointer)	Esher				jupiter	09/06/2022	
09/06/2022	11:12	Tablet APOQUEL 16MG X 100 TABS DOG (Give 2 Tablets 1 Times a day for 50 days -- ASDFFF Expires: 09/07/2022 -- STOP IF ANY SICKNESS OCCURS)	General	100	249.62	Name Arde4 (arde4)	Esher				jupiter	09/06/2022	
TOTAL					342.02								
Date: 10/08/2022													
Grand Total					623.35								

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3. Tick the Insurance box for the treatments required.

Treatment [ User - jupiter : Site - Esher : Profile - Back Reception1 ]

History Pre-Invoice Add Treatment Prescriptions Saved Estimates Documents Patients Client Notes Archive Health Care Plan

Filters: Description Clinical Code All Type All Reset Settings

Date	Time	Description	Clinical Code	Qty	Total	Surgeon	Site	Insu...	Ref...	Group	User	Modified	HCP
23/05/2022	14:21	Operation Castrate Dog	General	1	150.75	Tomasz Olszewski (to...	Esher				jupiter	23/05/2022	
23/05/2022	14:21	Injections Stock Propofo Per Mi (A059A02 Expires: 31/07/2022)	General	1.5	2.41	Tomasz Olszewski (to...	Esher				jupiter	23/05/2022	
TOTAL					153.16								
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09/06/2022	10:49	Book CONSULTATION around 25/Jun/2022 to see T Pointer (TPointer) for 10 minutes	General	0	0.00	T Pointer (TPointer)	Esher				jupiter	09/06/2022	
09/06/2022	10:48	Consultation Consultation 1	General	1	92.40	T Pointer (TPointer)	Esher				jupiter	09/06/2022	
09/06/2022	11:12	Tablet APOQUEL 16MG X 100 TABS DOG (Give 2 Tablets 1 Times a day for 50 days -- ASDFFF Expires: 09/07/2022 -- STOP IF ANY SICKNESS OCCURS)	General	100	249.62	Name Arde4 (arde4)	Esher				jupiter	09/06/2022	
TOTAL					342.02								
Date: 10/08/2022													
Grand Total					623.35								

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Displaying 1 - 23 of 23

4. Right click and select 'Save Insurance' or 'Add to Existing Insurance'

Treatment [ User - jupiter : Site - Esher : Profile - Back Reception1 ]

History Pre-Invoice Add Treatment Prescriptions Saved Estimates Documents Patients Client Notes Archive Health Care Plan

Filters: Description Clinical Code All Type All Reset Settings

Date	Time	Description	Clinical Code	Qty	Total	Surgeon	Site	Insu...	Ref...	Group	User	Modified	HCP
23/05/2022	14:21	Operation Castrate Dog	General	1	150.75	Tomasz Olszewski (to...	Esher				jupiter	23/05/2022	
23/05/2022	14:21	Injections Stock Propofo Per Mi (A059A02 Expires: 31/07/2022)	General	1.5	2.41	Tomasz Olszewski (to...	Esher				jupiter	23/05/2022	
TOTAL					153.16								
Date: 09/06/2022													
09/06/2022	10:49	History - Bright alert responsive the dog is very bouncy and cute	General	0	0.00	T Pointer (TPointer)	Esher				jupiter	09/06/2022	
09/06/2022	10:49	Book CONSULTATION around 25/Jun/2022 to see T Pointer (TPointer) for 10 minutes	General	0	0.00	T Pointer (TPointer)	Esher				jupiter	09/06/2022	
09/06/2022	10:48	Consultation Consultation 1	General	1	92.40	T Pointer (TPointer)	Esher				jupiter	09/06/2022	
09/06/2022	11:12	Tablet APOQUEL 16MG X 100 TABS DOG (Give 2 Tablets 1 Times a day for 50 days -- ASDFFF Expires: 09/07/2022 -- STOP IF ANY SICKNESS OCCURS)	General	100	249.62	Name Arde4 (arde4)	Esher				jupiter	09/06/2022	
TOTAL					342.02								
Date: 10/08/2022													
Grand Total					623.35								

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Displaying 1 - 23 of 23

5. This will give the claim a unique number for that patients treatment.

Treatment [ User - jupiter : Site - Esher : Profile - Back Reception1 ]

Payments

Referral

Print History

Barcode

Clinical

Doc Mgmt

Make Appt

Account

Weight

Consent

View PACS

Refresh

Patient Lab

History

Pre-Invoice

Add Treatment

Prescriptions

Saved Estimates

Documents

Patients

Client Notes

Archive

Health Care Plan

Filters:

Description

Clinical Code

All

Type

All

Reset

Settings

	Date	Time	Description	Clinical Code	Qty	Total	Surgeon	Site	Insu...	Ref...	Group	User	Modified	HCP
	23/05/2022	14:21	<b>Injections Stock</b> Propofol Per MI (A059A02 Expires: 31/07/2022)	General	1.5	2.41	Tomasz Olszewski (to...	Esher				jupiter	23/05/2022	
TOTAL						153.16								
Date: 09/06/2022														
	09/06/2022	10:49	History - Bright alert responsive the dog is very bouncy and cute	General	0	0.00	T Pointer (TPointer)	Esher	1			jupiter	24/10/2024	
	09/06/2022	10:49	Book CONSULTATION around 25/Jun/2022 to see T Pointer (TPointer) for 10 minutes	General	0	0.00	T Pointer (TPointer)	Esher	1			jupiter	24/10/2024	
	09/06/2022	10:48	<b>Consultation</b> Consultation 1	General	1	92.40	T Pointer (TPointer)	Esher	1			jupiter	24/10/2024	
	09/06/2022	11:12	<b>Tablet</b> APOQUEL 16MG X 100 TABS DOG (Give 2 Tablets 1 Times a day for 50 days -- ASDFFF Expires: 09/07/2022 -- STOP IF ANY SICKNESS OCCURS)	General	100	249.62	Name Arde4 (arde4)	Esher	1			jupiter	24/10/2024	
TOTAL						342.02								
Date: 10/08/2022														
	10/08/2022	13:48	Reminder letter sent to Finn A123456 on 10/08/22 for Consultation 1	General	0	0.00		Esher				jupiter	10/08/2022	
Grand Total						623.35								

6. Right clicking again will give you the ability to either 'Print Insurance' or 'Email Insurance'. You are also able to either delete single or multiple rows if needed.

Treatment [ User - jupiter : Site - Esher : Profile - Back Reception1 ]

Payments

Referral

Print History

Barcode

Clinical

Doc Mgmt

Make Appt

Account

Weight

Consent

View PACS

Refresh

Patient Lab

History

Pre-Invoice

Add Treatment

Prescriptions

Saved Estimates

Documents

Patients

Client Notes

Archive

Health Care Plan

Filters:

Description

Clinical Code

All

Type

All

Reset

Settings

	Date	Time	Description	Clinical Code	Qty	Total	Surgeon	Site	Insu...		Ref...	Group	User	Modified	HCP
	23/05/2022	14:21	Injections Stock Propofol Per MI (A059A02 Expires: 31/07/2022)	General	1.5	2.41	Tomasz Olszewski (to...	Esher					jupiter	23/05/2022	
TOTAL						153.16									
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	09/06/2022	10:49	History - Bright alert responsive the dog is very bouncy and cute	General	0	0.00	T Pointer (TPointer)	Esher	1				jupiter	24/10/2024	
	09/06/2022	10:49	Book CONSULTATION around 25/Jun/2022 to see T Pointer (TPointer) for 10 minutes	General	0	0.00	T Pointer (TPointer)	Esher	1				jupiter	24/10/2024	
	09/06/2022	10:48	Consultation Consultation 1	General	1	92.40	T Pointer (TPointer)	Esher	1				jupiter	24/10/2024	
	09/06/2022	11:12	Tablet APOQUEL 16MG X 100 TABS DOG (Give 2 Tablets 1 Times a day for 50 days -- ASDFFF Expires: 09/07/2022 -- STOP IF ANY SICKNESS OCCURS)	General	100	249.62	Name Arde4 (arde4)	Esher	1				jupiter	24/10/2024	
TOTAL						342.02									
Date: 10/08/2022															
	10/08/2022	13:48	Reminder letter sent to Finn A123456 on 10/08/22 for Consultation 1	General	0	0.00		Esher					jupiter	10/08/2022	
Grand Total						623.35									

Filter by Selection

Remove Filter

Transfer

Authorise Repeat

Reprint Label

Edit Label

Save Insurance

Add to Existing Insurance

Print Insurance

Email Insurance

VeXmI Insurance

Delete Insurance

Add to Draft

Repeat for Today

Reprint Label & Dispense

7. To print the insurance the first way is to right click and 'Print Insurance', this will generate as a PDF that can be printed.

Treatment [ User - jupiter : Site - Esher : Profile - Back Reception1 ]

Payments

Referral

Print History

Barcode

Clinical

Doc Mgmt

Make Appt

Account

Weight

Consent

View PACS

Refresh

Patient Lab

History

Pre-Invoice

Add Treatment

Prescriptions

Saved Estimates

Documents

Patients

Client Notes

Archive

Health Care Plan

Filters: Description

Clinical Code

All

Type

All

Reset

Settings

	Date	Time	Description	Clinical Code	Qty	Total	Surgeon	Site	Insu...		Modified	HCP
Date: 09/06/2022												
	09/06/2022	10:49	History - Bright alert responsive the dog is very bouncy and cute	General	0	0.00	T Pointer (TPointer)	Esher	1			
	09/06/2022	10:49	Book CONSULTATION around 25/Jun/2022 to see T Pointer (TPointer) for 10 minutes	General	0	0.00	T Pointer (TPointer)	Esher	1			
	09/06/2022	10:48	Consultation Consultation 1	General	1	92.40	T Pointer (TPointer)	Esher	1			
	09/06/2022	11:12	Tablet APOQUEL 16MG X 100 TABS DOG (Give 2 Tablets 1 Times a day for 50 days -- ASDFFF Expires: 09/07/2022 -- STOP IF ANY SICKNESS OCCURS)	General	100	249.62	Name Arde4 (arde4)	Esher	1			
TOTAL						342.02						
Date: 10/08/2022												
	10/08/2022	13:48	Reminder letter sent to Finn A123456 on 10/08/22 for Consultation 1	General	0	0.00		Esher				
	10/08/2022	13:50	Reminder letter sent to Finn A123456 on 10/08/22 for Consultation 1	General	0	0.00		Esher				
	10/08/2022	13:57	Reminder letter sent to Finn A123456 on 10/08/22 for Consultation 1	General	0	0.00		Esher				
Grand Total						623.35						

Filter by Selection

Remove Filter

Transfer

Authorise Repeat

Reprint Label

Edit Label

Save Insurance

Add to Existing Insurance

Print Insurance

Email Insurance

VetXml Insurance

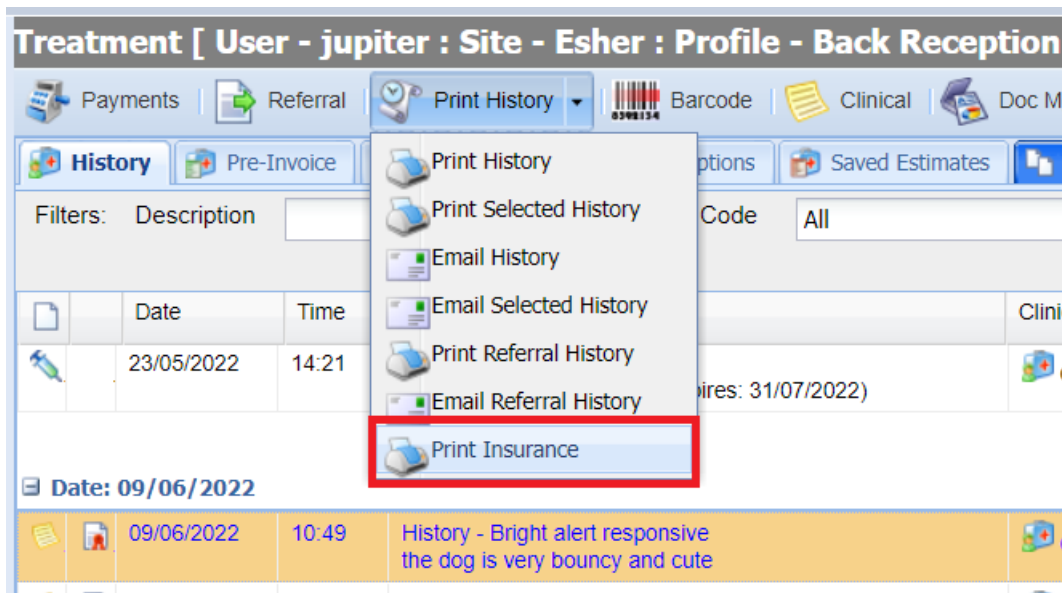
Delete Insurance

Add to Draft

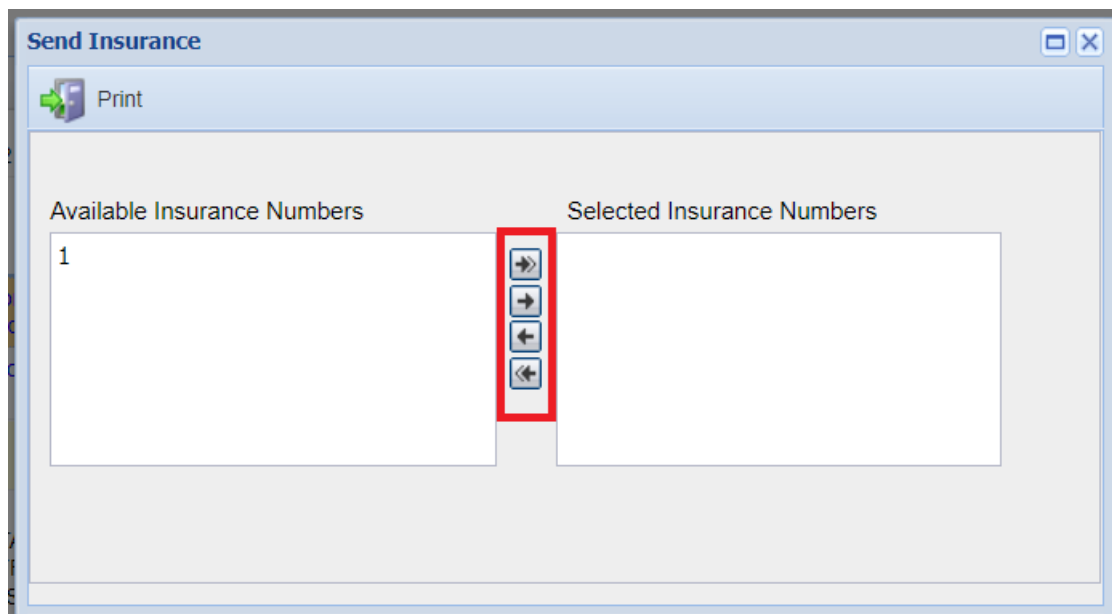
Repeat for Today

Reprint Label & Dispense

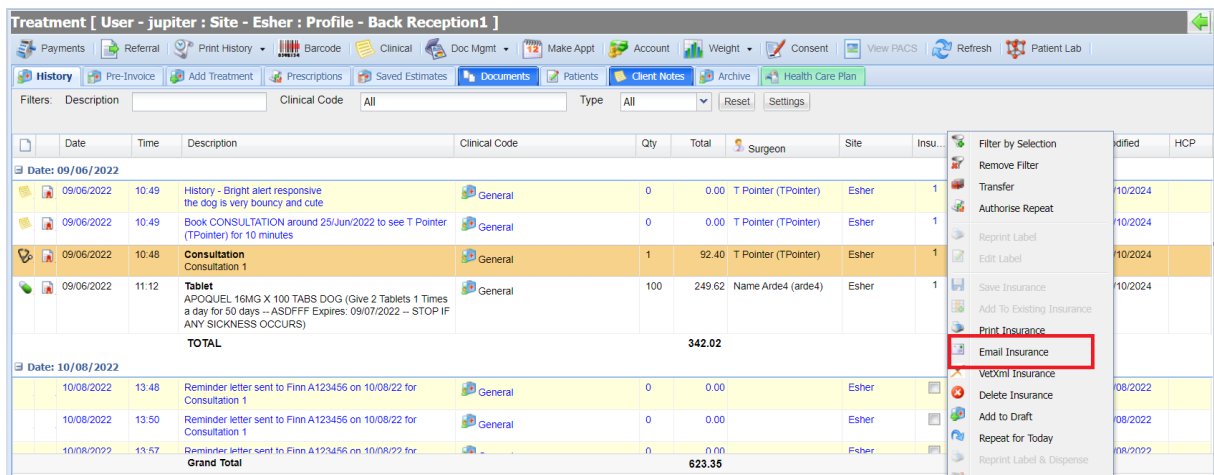
8. The second way to print insurance is to go to the 'Print History' button and select 'Print Insurance'



- From here you can then select the Available number/s of insurance you wish to print and using the arrows move these over to the right hand side. This then can be generated as a PDF that can be printed or saved.



- To email from this screen, right click and select 'Email Insurance'



11. The following box will generate. Allowing you to add the email address and write the body of the email. The insurance document will be added as an attachment and can be viewed before sending.

The screenshot displays the 'Merlin Email Client' window. At the top, there are input fields for 'To...', 'Cc...', and 'Subject: Message from RM Veterinary Practice'. Below these is a large rich text editor with a toolbar containing various formatting options like bold, italic, underline, and font color. Underneath the editor is an 'Attachments:' section showing 'Insurance.pdf' with a 'View' button. At the bottom, there is a 'Communication Type' dropdown set to 'Contractual' and a row of action buttons: 'Send Email', 'Insert Image', 'Insert File', and 'Cancel'. Red rectangular boxes highlight the 'To', 'Cc', and 'Subject' fields; the rich text editor; the 'Attachments' section; and the bottom toolbar buttons.

12. Once ready, send the email. Details of the email sent will be visible within the communication tab within the client record.