Dogs Trust Neutering Portal Guide
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1. Contacts

The table below summarises the main points of contact in Dogs Trust for any questions or issues when using the Neutering portal.

<table>
<thead>
<tr>
<th>Contact</th>
<th>Phone</th>
<th>Email</th>
<th>Reason to Contact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campaigns Team</td>
<td>020 7837 0006</td>
<td><a href="mailto:campaigns@dogtrust.org.uk">campaigns@dogtrust.org.uk</a></td>
<td>Additional funding</td>
</tr>
<tr>
<td>Neutering Team</td>
<td>Email only</td>
<td><a href="mailto:portal@dogtrust.org.uk">portal@dogtrust.org.uk</a></td>
<td>New users</td>
</tr>
<tr>
<td>Neutering Team</td>
<td>Email only</td>
<td><a href="mailto:portal@dogtrust.org.uk">portal@dogtrust.org.uk</a></td>
<td>Access issues *note forgotten passwords can be reset using the website.</td>
</tr>
</tbody>
</table>

*note*
2. Introduction

This guide details how to use the new Dogs Trust Neutering Claim Web Portal which is being rolled out to replace the existing paper based system. Claims will now be processed through the web portal rather than by manually posting in invoices and claims.

The overall process isn’t changing - we are just using a website instead of the trees!

![Diagram of neutering claim process]

The important thing to note here is the difference between claims and batches:

- **Claim** – each neuter requires a claim, containing the owner and dog details. Each claim has its own claim number (starting ‘NC-‘) In order to submit the claim, it will need to be added to a batch.

- **Batch** – this can contain one or more claim and is used to submit the claims to Dogs Trust. Each batch has its own batch number (starting ‘NB-‘).
3. Access the Website

The neutering portal can be accessed with the following URL:

https://portal.dogstrust.org.uk/Login

Your log in will be sent directly to your email address (that you have provide us).

You should have received your username and password via email in order to login. If you don’t have these details you will need to contact portal@dogstrust.org.uk or call us on 020 7837 0006

a. First Log In

If it is the first time you are logging in you will be prompted to change the password. This is to ensure secure access to the website.

b. Forgotten Password

If you are unable to remember your login password you can click the Forgot Password link to Request a password. This will email you a new password.
4. Claims
A Claim relates to a single neutering. Each dog being neutered requires its own Claim, even if the owner is the same person.

a. Creating Claim

1. Log in to Neutering portal and click on the Claims summary page.
2. Click ‘Add a new claim’:
This opens a new claim:

New Claim

A new claim is created in a draft state. This means that all sections of the form are editable.

3. **General section**:
   
a. Practice and Vet’s name are by default set to the user logged in. Depending on your permissions you may have the ability to select different Practices and Vets from the drop down list:

   ![Practice and Vet's name drop down list]

   **PLEASE NOTE**: the name of a vet will only appear if they have an individual portal log-in connected to the selected practice. We are aware that vets may not be involved in the invoicing and accounts, that there may be locum vets carrying out the operation, or that there may be another reason for the operating vet to not have an individual portal log-in. If the correct name does not appear in the drop down list, please select the ‘Administrator’ option and continue.
b. The Date of neutering operation is defaulted to the day the claim is created. This can be updated by clicking the field and selecting a new date:

4. **About the dog’s owner section:**

   a. Owner’s title – select from drop down list.
   b. Fill in the Owner’s first name and surname.
   c. Enter owner’s postcode and click Search. A box of addresses with that postcode will be displayed:

   d. If the owner’s address is not present you can click Enter Address manually to type the address.
5. **About the claim section:**
   
a. Select which scheme the neutering claim is related to:

   **About the claim**

   **Which scheme does this claim relate to?** *

   
   - Please select
   - Please select
   - **£35 Voucher**
   - **Free Voucher**

   Only schemes available in your practices area will be available in the dropdown.

   **Scheme summary:**

   - **£35 Voucher** – select if the owner has presented you with a Dogs Trust voucher entitled ‘£35 Neutering Voucher’
   - **Free Voucher** – select if the owner has presented you with a Dogs Trust voucher entitled ‘FREE Neutering Voucher’
   - **Vet £35 Subsidised Scheme** – select if the owner meets the scheme requirements and has presented you with proof of benefits.
   - **Chance of a Lifetime (COAL)** – NORTHERN IRELAND ONLY select if the owner has presented you with one of our ‘COAL’ vouchers

b. If you selected one of the voucher schemes, a Voucher code box will appear and the voucher number should be entered:

   i. The box will be highlighted red if the voucher code is invalid, this will not allow the claim to be submitted:

   **Voucher code**

   
   L0DFR

   Voucher with code L0DFR could not be found.

   ii. The box will be highlighted green if the voucher code is valid:

   **Voucher code**

   
   L0003
6. **About the Dog section:**

   **About the dog**

   **Dog’s first name** *
   
   [Input field] Spot

   - [ ] Crossbreed?
     
     (If yes, the breed selection should indicate the primary breed)

   **Breed** *
   
   [Input field] Please select

   **Dog’s gender** *
   
   - [ ] Male
   - [ ] Female

   **Additional costs reference**
   
   [Input field] NF-

   - [ ] Proof of ID checked *

   **Total amount**
   
   [Input field] £ 100.00

   a. Enter the Dog’s first name
   b. Tick if the dog is a crossbreed.
   c. Select the Breed (if cross breed the primary breed should be selected).
   d. Select the Dog’s gender.
   e. If the claim had additional costs enter the reference here, this will have been provided by the campaigns team. (See section 7 Additional Funding)
   f. Confirm Proof of ID had been checked.
   g. Confirm if relevant that Proof of benefits have been checked. Note this field only shows for schemes which this is relevant for.

7. **Click Save Claim**.
8. **Repeat for as many claims as required.**
9. If you press home or claims button at the top you will go back to the Claims page. Here you will see the created claims in Draft status on the claim list:

**Claims**

<table>
<thead>
<tr>
<th>Last update</th>
<th>Claim no</th>
<th>Dog's name</th>
<th>Practice</th>
<th>Vet</th>
<th>Status</th>
<th>Batch no</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/07/2017</td>
<td>NC-00007</td>
<td>Spot</td>
<td>Brookfield Vets</td>
<td>Jake Bugg</td>
<td>Draft</td>
<td></td>
</tr>
<tr>
<td>19/05/2017</td>
<td>NC-00006</td>
<td>Schnorbits</td>
<td>Brookfield Vets</td>
<td>Jake Bugg</td>
<td>Submitted</td>
<td>NB-00003</td>
</tr>
<tr>
<td>19/05/2017</td>
<td>NC-00005</td>
<td>Rex</td>
<td>Brookfield Vets</td>
<td>Jake Bugg</td>
<td>Submitted</td>
<td>NB-00003</td>
</tr>
</tbody>
</table>

**b. Additional Funding**

In the event there are complications and additional funding is required, the first step is to contact the campaigns team to get agreement for additional funding.

The campaigns team will generate an additional funding reference number and give this to you. Note: funding references are created against your practice as such they are non-transferable.

When completing the claim the additional funding reference number should be entered in the Additional costs reference box:

**Additional costs reference**

If an invalid reference number is input, the box will be highlighted red and an error will be presented if you try to save the claim:

**Additional costs reference**

If a valid reference number is input, the box will be highlighted green and valid will be displayed:

**Additional costs reference**

Valid

The total cost of the claim will be updated to include the agreed additional funding:
5. Batches

Batches can be created and submitted at any time, although we recommend no less frequently than monthly. A batch can contain any number of claims but must contain at least one claim.

Any supporting documents such as invoices or pictures relating to the claim should be attached to the batch.

a. Creating a Batch

1. Log in to Neutering portal or click onto the Batches summary page.
2. Click Add a New Batch:

![Add a new batch button]

3. General Section
   a. The Batch will be created in draft status with a unique Batch number. The practice and vet’s name will be autocompleted based on the users log in.

PLEASE NOTE: the name of a vet will only appear if they have an individual portal log-in connected to the selected practice. We are aware that vets may not be involved in the invoicing and accounts, that there may be locum vets carrying out the operation, or that there may be another reason for the operating vet to not have an individual portal log-in. If the correct name does not appear in the drop down list, please select the ‘Administrator’ option and continue.
b. Notes to Finance – if there are any comments which need added to the batch they can be typed here.

c. Attaching Invoices/Supporting Documentation

1. You will need to attach a practice invoice that covers ALL of the claims in the Batch (if the total on the invoice does not match the total of the Claims in the Batch, the invoice will be rejected). This invoice must be addressed to Dogs Trust and contain the owner name, dog name and the correct amount that you are invoicing Dogs Trust for.
2. The attachments section is below the general section:

3. If you need to add documents to a previously created Batch go to the Batch screen and select the Batch you wish to open. This will then show the attachments section.
4. PLEASE DO NOT ATTACH ANY OF YOUR CLIENTS’ PERSONAL DOCUMENTS (INCLUDING SCANS OF ID OR PROOF OF BENEFITS).
5. Click the Browse button to find the location on your PC/network where the attachment is saved:

![Image of file explorer]

6. Select the attachment and click ‘Open’.

Upload a new attachment

![Browse button]

invoice scan.jpg.bmp

Title *

Claim NC-002 invoice

Description

You will see the attachment name next to the ‘Browse’ button.

7. Give the attachment a title (eg. the name of the Claim the attachment is related to).
8. If required you can add further details in the description (e.g. photo of complications)
9. Click ‘Save and upload’. If you decide not to attach the file you can skip this step to not add the attachment.
d. Adding/Removing Claims on a Batch

The Claims section shows a) any Claims currently in this Batch and b) any Claims available to be added to the Batch.

1. Click the ‘Add’ box on the Claim you wish to add to the Batch:

   Add claims
   Find existing claims that have not yet been submitted or been added to another claims batch

<table>
<thead>
<tr>
<th>Add</th>
<th>Last update</th>
<th>Claim no</th>
<th>Dog’s name</th>
<th>Branch</th>
<th>Vet</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓</td>
<td>05/07/2017</td>
<td>NC-00007</td>
<td>Spot</td>
<td>Brookfield Vets</td>
<td>Jake Bugg</td>
<td>Draft</td>
</tr>
</tbody>
</table>

2. As soon as you click the box, the Claim moves into the ‘Claims in this batch’ section:

   Claims in this batch

<table>
<thead>
<tr>
<th>Remove</th>
<th>Last update</th>
<th>Claim no</th>
<th>Dog’s name</th>
<th>Branch</th>
<th>Vet</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>05/07/2017</td>
<td>NC-00007</td>
<td>Spot</td>
<td>Brookfield Vets</td>
<td>Jake Bugg</td>
<td>Draft</td>
</tr>
</tbody>
</table>

3. Repeat the process for as many Claims as you wish to add to the Batch.

4. To remove Claims from the Batch, click the ‘Remove’ box in the ‘Claims in this batch’ section:

   Claims in this batch

<table>
<thead>
<tr>
<th>Remove</th>
<th>Last update</th>
<th>Claim no</th>
<th>Dog’s name</th>
<th>Branch</th>
<th>Vet</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>05/07/2017</td>
<td>NC-00007</td>
<td>Spot</td>
<td>Brookfield Vets</td>
<td>Jake Bugg</td>
<td>Draft</td>
</tr>
</tbody>
</table>

5. This will remove it from the Batch and place it back in the available Claims section.

e. Saving a Batch

Batches can be saved as a draft. This means you can continue to add Claims and attachments to the Batch. This is useful if you wish to create weekly/monthly batches, as you can create the Batch initially and add Claims on an ad-hoc or daily basis until you are ready to submit the Batch.

To save the Batch:
1. After making desired changes scroll to the Save section of the page (below attachments and above the claims summary):

   ![Save as draft button]

   If you hit save and submit you will not be able to change details or claims associated to the batch. You will be able to upload more attachments.

2. Click the ‘Save as draft’ button:

   f. Submitting a Batch

   Once all Claims and attachments have been added, the Batch needs to be submitted to Dogs Trust for processing. To do this:

   **Note: if you are already logged into the system or have the correct Batch open, skip Steps 1 and 2.**

   1. Log in to the system.
   2. Select the Batch to be submitted.
   3. Scroll down to the ‘Save and submit’ section of the page (below attachments and above the Claims summary):

   ![Save and submit button]

   If you hit save and submit you will not be able to change details or claims associated to the batch. You will be able to upload more attachments.

   4. Click ‘Save and submit’:

   ![Save and submit button]

   5. A message will display at the top of the screen confirming the Batch has been submitted:
You will also see on the Batch summary screen that the status of the Batch is now submitted:

Submitting the Batch will also update the status of any Claims contained in the Batch.
7. Making Amendments to Rejected Batch

PLEASE NOTE: to view rejected Batches, you need to open the Batches summary page (see below).

You cannot view rejected Batches if on the Claims summary page. You cannot make changes to individual Claims in the Batch.

When you go to the Batches screen you can see a summary of all the Batches in each state. The number of rejected Batches will indicate if there are any rejected Batches. The actual Batch which has been rejected can be identified by the Status column. You can also apply a filter to only show rejected batches:

Batches

1. Open the rejected Batch by clicking the Batch number.
2. The rejection reason is stated at the top. To make changes and resubmit click the Re-open button.

Re-opening the rejected Batch creates a new batch which can be amended and then submitted with a new Batch number.

It will auto attach all the Claims from the rejected batch, but these can be added to or removed as in a new Batch.

3. Make any changes to resolve the rejection and click ‘Save and submit’ as normal.
6. Overview of Site

a. Claims:
When you first login you are presented with a dashboard showing any existing claims. Here you can:

- Navigate to batches page
- View the number of claims in each state
- Add a new Claim
- Move forward and back between This month, last month, Previous 3 months
- Filter the list below
- View a list of existing claims
- Search for a specific
b. Batches:

When you go to the Batches screen you are presented with a dashboard showing all the existing batches. Here you can:

- **Navigate to Claims**
- **View number of batches in each**
- **Filter the list**
- **Search for a specific Batch**
- **Add a new Batch**
- **Move forward and back between This Month, Last Month, Previous 3 Months**

View list of existing Batches
c. **Filters**

Each summary page (Claims and Batches) can have filters applied:

These can be used to reduce the number of Claims or Batches showing in the list.

d. **Searching**

If you are searching for a particular Batch or Claim you can use the keyword search to help identify the specific item.
7. Status Definitions

Claims and Batches each have a status. The statuses available in the system are:

<table>
<thead>
<tr>
<th>Status</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft</td>
<td>Practice/Vet is working on the claim/batch. Everything is editable.</td>
</tr>
<tr>
<td>Submitted</td>
<td>Batch and claims are ready for Dogs Trust to process and is no longer</td>
</tr>
<tr>
<td></td>
<td>editable. Further attachments can be added to batches.</td>
</tr>
<tr>
<td>In Progress</td>
<td>Dogs Trust are processing the Batch/Claim.</td>
</tr>
<tr>
<td>Approved</td>
<td>Dogs Trust have approved the Claim/Batch and finance will be issuing</td>
</tr>
<tr>
<td></td>
<td>payment within 30 days.</td>
</tr>
<tr>
<td>Rejected</td>
<td>Dogs Trust have rejected the Claim/Batch details of why will be present</td>
</tr>
<tr>
<td></td>
<td>in the rejection reason on the web portal.</td>
</tr>
</tbody>
</table>