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>
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 the process]

**Figure 1 Overall Process of Neutering Claim**

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.

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 theForgot 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**

This claim is in draft. You can edit all parts of the claim

<table>
<thead>
<tr>
<th>General</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Practice</strong> *</td>
</tr>
<tr>
<td>Brookfield Vets</td>
</tr>
<tr>
<td><strong>Staff member</strong> *</td>
</tr>
<tr>
<td>Jake Bugg</td>
</tr>
<tr>
<td><strong>Date of neutering operation</strong> *</td>
</tr>
<tr>
<td>20/09/2018</td>
</tr>
</tbody>
</table>

A new claim is created in a draft state. This means that all sections of the form are editable. **The claim will remain as a draft until it is added to a batch and submitted.**

3. **General section:**

   a. Practice and Staff member’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 Staff Members from the drop down list:

```
Please select a staff member
Administrator
Ed Sheeran
Jake Bugg
```

**PLEASE NOTE:** Named user accounts can only be directly connected to ONE practice account, with permissions added to submit claims for other practice accounts. If you are submitting claims for more than one practice account, your name will only appear in the ‘Staff member’ drop down list if the ‘Practice’ drop down list is set to the MAIN practice that your user account is connected to. If you do not see your name in the ‘Staff member’ drop down list, please select the ‘Administrator’ option. This will not affect how your claim is processed.
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:

   **About the dog’s owner**

   **Owner’s title**: select from drop down list.
   **Owner’s first name**: fill in the owner's first name and surname (if the dog does not have an owner, put the name of the kennel or rescue in both boxes).
   **Owner’s surname**: enter owner's surname.
   **Enter owner’s postcode**: enter owner’s postcode and click Search. A box of addresses with that postcode will be displayed:

   Enter owner’s postcode
   **Enter address manually**

   **Select an address**: 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:

   **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.
   - **£35 Farm Dog** – WALES ONLY select if the owner meets the scheme requirements and has presented you with a farm holding number
   - **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:

   c. If you have entered an invalid voucher code, or entered a voucher code that has already been redeemed, when you hit ‘Save’ you will get an error message and the ‘Voucher code’ box will turn red:
i. Invalid voucher code

Voucher code

ABCDEFG

Voucher with code ABCDEFG could not be found.

ii. Voucher code already redeemed

Voucher code

NC1802769

Voucher code has already been redeemed.

d. If you selected ‘£35 Farm Dog’, a ‘Farm Holding Number’ box will appear and the given farm holding number should be entered:

<table>
<thead>
<tr>
<th>About the claim</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Which scheme does this claim relate to?</strong> *</td>
</tr>
<tr>
<td>£35 Farm Dog</td>
</tr>
<tr>
<td><strong>Farm Holding Number</strong></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>
6. **About the Dog section:**

   **About the dog**

   **Dog's first name** *
   
   Enter the Dog’s first name

   **Tick if the dog is a crossbreed.**
   (If yes, the breed selection should indicate the primary breed)

   **Breed** *
   
   Select the Breed (if cross breed the primary breed should be selected – if there is no primary breed, just select ‘A crossbreed’).

   **Dog's gender** *
   
   Select the Dog’s gender.

   **Additional costs reference**
   
   If the claim had additional costs enter the reference here, this will have been provided by the campaigns team. (See [section 7 Additional Funding](#))

   **Proof of ID checked** *

   **Proof of benefit checked** *

   **Total amount**
   
   £ 75.00

   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 – if there is no primary breed, just select ‘A crossbreed’).
   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. PLEASE NOTE: this field will only show if you have selected ‘Vet £35 Subsidised Scheme’.

7. Click ‘Save Claim’:

   ![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>04/01/2017</td>
<td>NC-00001</td>
<td>Spot</td>
<td>Brookfield Vets</td>
<td>Jake Bugg</td>
<td>Draft</td>
<td></td>
</tr>
<tr>
<td>04/01/2017</td>
<td>NC-00002</td>
<td>Schoobitz</td>
<td>Brookfield Vets</td>
<td>Jake Bugg</td>
<td>Submitted</td>
<td>NB-00002</td>
</tr>
<tr>
<td>04/01/2017</td>
<td>NC-00003</td>
<td>Rex</td>
<td>Brookfield Vets</td>
<td>Jake Bugg</td>
<td>Submitted</td>
<td>NB-00003</td>
</tr>
</tbody>
</table>

The claims will remain as drafts until they are added to a batch and submitted. Claims CANNOT be submitted without being added to a batch. See Section 5 for more information on batches.

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.

PLEASE NOTE: references are created against ONE practice account and are non-transferable – please make sure the additional funding is requested for the correct practice.

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

PLEASE NOTE: if the reference is invalid, make sure you have selected the practice that the funding was authorised for in the ‘General’ section.

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:

<table>
<thead>
<tr>
<th>Additional costs reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>NF-0000004</td>
</tr>
<tr>
<td>Valid</td>
</tr>
<tr>
<td>Proof of ID checked *</td>
</tr>
<tr>
<td>Total amount</td>
</tr>
<tr>
<td>£ 135.00</td>
</tr>
</tbody>
</table>

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.

**PLEASE NOTE:** if you are in charge of submitting claims for more than one practice, please create different batches for claims from different practices. For example: instead of creating a batch containing claims from Practice 1, Practice 2 and Practice 3, please create a batch containing claims from Practice 1, a batch containing claims from Practice 2, and a batch containing claims from Practice 3.

a. **Creating a Batch**

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

   ![Batch create image]

3. **General Section**

   a. The Batch will be created in draft status with a unique Batch number. Practice and Staff member’s name are by default set to the user logged in. Please ensure that you have selected the correct practice to match with the claims.

   **PLEASE NOTE:** Named user accounts can only be directly connected to ONE practice account, with permissions added to submit claims for other practice accounts. If you are submitting claims for more than one practice account, your name will only appear in the ‘Staff member’ drop down list if the ‘Practice’ drop down list is set to the MAIN practice that your user account is connected to. If you do not see your name in the ‘Staff
member' drop down list, please select the ‘Administrator’ option. This will not affect how your claim is processed.

Batch #NB-00004

This batch is in draft. You can edit all parts of the batch

b. Notes to Finance – if there are any comments which need added to the batch they can be typed here.

b. 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.

**PLEASE SEE THE NEXT PAGE FOR AN EXAMPLE OF THE INFORMATION YOU SHOULD INCLUDE ON YOUR INVOICE**
**NOTE:** it is easier and quicker to process your payment if you include all of the claims for a batch in ONE invoice, which can then be attached to the batch as a single attachment.

**EXAMPLE INVOICE**

**INVOICE #100**

**DATE:** [DATE]

---

**NAME:**
Dogs Trust
17 Wadley Street
London
EC1V 7RQ

---

<table>
<thead>
<tr>
<th>PATIENT</th>
<th>OWNER</th>
<th>DETAILS</th>
<th>PRICE</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Dog name (and owner name, if possible — if dog is from a kennel, don’t worry about the owner name)

Details of procedure: castration or spay

---

Also include details of any complications/extras (as discussed with and authorised by Dogs Trust)

---

Make sure the overall invoice total EXACTLY MATCHES the total of the batch. If not, the batch will be rejected.

---

The total amount you are invoicing Dogs Trust for (see guidelines for details of pricing — do NOT include owner’s £35 contribution). Include additional funding (as discussed with and authorised by Dogs Trust)

---

Make sure the invoice is made out directly Dogs Trust (and NOT to the owner).
2. The attachments section is below the general section. 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.

3. Click ‘Upload a new attachment’:

4. Click ‘Browse’:

5. Find the location on your PC/network where the attachment is saved. Click the document you want to attach and click ‘open’:
6. You will see the attachment name next to the ‘Browse’ button.

![Browse button with invoice description.docx]

7. Give the attachment a title (e.g. 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)

![Attachment title input field with Brookfield Invoice 21/9/18]

9. Click ‘Save and upload’. PLEASE NOTE: if you do not click ‘save and upload’, the document will not attach and you will be unable to submit the batch.

![Description input field]

---

c. 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.

<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>21/09/2018</td>
<td>NC-93880</td>
<td>Princess</td>
<td>HQ Test Vet</td>
<td>Erin E</td>
<td>Draft</td>
</tr>
<tr>
<td></td>
<td>21/09/2018</td>
<td>NC-93878</td>
<td>Rover</td>
<td>HQ Test Vet</td>
<td>Erin E</td>
<td>Draft</td>
</tr>
<tr>
<td></td>
<td>21/09/2018</td>
<td>NC-93877</td>
<td>Spot</td>
<td>HQ Test Vet</td>
<td>Erin E</td>
<td>Draft</td>
</tr>
</tbody>
</table>

Add claims
Find existing claims that have not yet been submitted or been added to another claims batch.
1. **Click the ‘Add’ box on the Claim you wish to add to the Batch:**

**Add claims**

<table>
<thead>
<tr>
<th>Add</th>
<th>Date</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>21/09/18</td>
<td>NC-03880</td>
<td>Princess</td>
<td>HQ Test Vet</td>
<td>Erin E</td>
<td>Draft</td>
</tr>
<tr>
<td></td>
<td>21/09/18</td>
<td>NC-03878</td>
<td>Rover</td>
<td>HQ Test Vet</td>
<td>Erin E</td>
<td>Draft</td>
</tr>
<tr>
<td></td>
<td>21/09/18</td>
<td>NC-03877</td>
<td>Spot</td>
<td>HQ Test Vet</td>
<td>Erin E</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>24/09/18</td>
<td>NC-03880</td>
<td>Princess</td>
<td>HQ Test Vet</td>
<td>Erin E</td>
<td>Draft</td>
</tr>
</tbody>
</table>

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

**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>24/09/18</td>
<td>NC-03877</td>
<td>Spot</td>
<td>HQ Test Vet</td>
<td>Erin E</td>
<td>Draft</td>
</tr>
<tr>
<td>✔</td>
<td>24/09/18</td>
<td>NC-03878</td>
<td>Rover</td>
<td>HQ Test Vet</td>
<td>Erin E</td>
<td>Draft</td>
</tr>
<tr>
<td>✔</td>
<td>24/09/18</td>
<td>NC-03880</td>
<td>Princess</td>
<td>HQ Test Vet</td>
<td>Erin E</td>
<td>Draft</td>
</tr>
</tbody>
</table>

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>24/09/18</td>
<td>NC-03877</td>
<td>Spot</td>
<td>HQ Test Vet</td>
<td>Erin E</td>
<td>Draft</td>
</tr>
<tr>
<td>✔</td>
<td>24/09/18</td>
<td>NC-03878</td>
<td>Rover</td>
<td>HQ Test Vet</td>
<td>Erin E</td>
<td>Draft</td>
</tr>
<tr>
<td>✔</td>
<td>24/09/18</td>
<td>NC-03880</td>
<td>Princess</td>
<td>HQ Test Vet</td>
<td>Erin E</td>
<td>Draft</td>
</tr>
</tbody>
</table>

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

   ![Save as draft button]


e. 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 the Claims summary):
4. Click ‘Save and submit’:
5. A message will display at the top of the screen confirming the Batch has been submitted:

Batch #NB-00004

![Message box](image)

You will also see on the Batch summary screen that the status of the Batch is now submitted:

![Batch summary screen](image)

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

You will receive an email when your batch is either approved or rejected. If it is rejected, the email will give a reason for that rejection. You can re-open a rejected batch and make amendments.

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:

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.

3. Re-opening the rejected Batch creates a new batch with a new Batch number – it will auto attach all the Claims and attachments from the rejected Batch. All amendments should then be made to this new Batch (which will have a ‘Draft’ status. The rejected Batch will then have the status ‘Re-opened’, and will no longer be active.

4. If the rejection reason was related to the attached supporting documents, please attach any amended documents to the new Batch. You will NOT be able to remove any of the previous attachments – please indicate in the ‘notes to finance’ and the ‘description’ boxes which attachment is the correct one.

5. If the rejection reason was related to a Claim, please open the Claim and make any necessary amendments. If the Claim you’re amending has a £35 or Free voucher number, click ‘Release Voucher’ (which changes the voucher code status from ‘redeemed’ to ‘available’) and re-enter the voucher number:

   **Voucher code**
   
   L1700021
   
   The voucher L1700021 is valid
   
   Release voucher

   When you save the changes to the Claim, the amended Claim will now be attached to the Batch. You can also create any new Claims as necessary and add them to the Batch.

6. When the necessary changes to the Batch have been made, click ‘save and submit’. 
7. Overview of Site

a. Claims:
When you first log in 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
- Search for a specific
- View a list of existing claims

<table>
<thead>
<tr>
<th>Last update</th>
<th>Dog’s name</th>
<th>Practice</th>
<th>Vet</th>
<th>Status</th>
<th>Batch no</th>
</tr>
</thead>
<tbody>
<tr>
<td>19/05/2017</td>
<td>Schnorlitz</td>
<td>Brookfield Vets</td>
<td>Jake Bugg</td>
<td>Submitted</td>
<td>NB-00003</td>
</tr>
<tr>
<td>19/05/2017</td>
<td>Rex</td>
<td>Brookfield Vets</td>
<td>Jake Bugg</td>
<td>Submitted</td>
<td>NB-00003</td>
</tr>
<tr>
<td>19/05/2017</td>
<td>Archie</td>
<td></td>
<td>Jake Bugg</td>
<td>Submitted</td>
<td>NB-00003</td>
</tr>
<tr>
<td>03/05/2017</td>
<td>Fiji</td>
<td></td>
<td>Jake Bugg</td>
<td>Submitted</td>
<td>NB-00002</td>
</tr>
<tr>
<td>30/05/2017</td>
<td>Poppy</td>
<td></td>
<td>Jake Bugg</td>
<td>Draft</td>
<td>NB-00001</td>
</tr>
<tr>
<td>26/04/2017</td>
<td>Rex</td>
<td></td>
<td>Jake Bugg</td>
<td>Draft</td>
<td>NB-00001</td>
</tr>
</tbody>
</table>
b. Batches:
When you go to the Batches screen you are presented with a dashboard showing all the existing batches. Here you can:
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.
8. 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 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 payment within 30 days.</td>
</tr>
<tr>
<td>Rejected</td>
<td>Dogs Trust have rejected the Claim/Batch details of why will be present in the rejection reason on the web portal.</td>
</tr>
</tbody>
</table>