Dogs Trust Neutering Portal Guide
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1. Version Control

<table>
<thead>
<tr>
<th>Version</th>
<th>Date</th>
<th>Author</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>21/09/2017</td>
<td>A Cairns</td>
<td>Issued version 1 of user guide</td>
</tr>
</tbody>
</table>

2. 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>Campaigns Team</td>
<td>020 7837 0006</td>
<td><a href="mailto:campaigns@dogtrust.org.uk">campaigns@dogtrust.org.uk</a></td>
<td>New users</td>
</tr>
<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>Access issues *note forgotten passwords can be reset using the website.</td>
</tr>
</tbody>
</table>

*note forgotten passwords can be reset using the website.
3. 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, this will detail the owner and dog details.
- **Batch** – this can contain one or more claim and is used to submit the claims to dogs trust.
4. 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 campaigns@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.
5. Overview of Site

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

<table>
<thead>
<tr>
<th>Claims</th>
<th>Batches</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft</td>
<td>2</td>
</tr>
<tr>
<td>Submitted</td>
<td>4</td>
</tr>
<tr>
<td>In Progress</td>
<td>0</td>
</tr>
<tr>
<td>Approved</td>
<td>0</td>
</tr>
<tr>
<td>Rejected</td>
<td>0</td>
</tr>
</tbody>
</table>

- Navigate to batches page
- View the number of claims in each state
- Filter the list below
- Keyword search
- View a list of existing claims
- Add a new Claim
- Move forward and back between This month, last month, Previous 3 months

b. Batches:
When you navigate to Batches 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:

- **Status**
- **Date range**
- **Branch**
- **Vet**

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.
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 14 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>

6. 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 or Navigate to 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:
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.

   b. If a voucher is required for the scheme 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:**

   - **Dog’s first name** *
     
     **Spot**

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

   - **Breed** *
     
     Please select

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

   - **Additional costs reference**
     
     NF-

   - [ ] Proof of ID checked *

   - **Total amount**
     
     £ 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 navigate back to the Claims page you will see the created claims in Draft status on the claim list:

**Claims**

![Claim status screenshot](image1.png)

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**

![Invalid reference number](image2.png)

![Valid reference number](image3.png)

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**

![Invalid reference number](image2.png)

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

**Additional costs reference**

![Valid reference number](image3.png)

Valid

The total cost of the claim will be updated to include the agreed additional funding:
7. **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 Navigate to Batches summary page.
2. Click Add a New Claim Batch:

   ![Add a new batch](image)

   Batches

   ![Draft: 1, Submitted: 2, In Progress: 0, Approved: 0, Rejected: 0](image)

   Filters

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:
b. Notes to Finance – if there are any comments which need added to the batch e.g. <???> they can be typed here.

b. Attaching Supporting Documentation

1. If you are continuing the creation of a batch the attachments section is below the general section:

2. If you need to add docs to a previously created Batch navigate to the batch screen and select the batch you wish to open. This will then show the attachments section.
3. Click the Browse button to find the location on your PC/network where the attachment is saved:

![Image of Browse button]

4. Select the attachment and click Open.

Upload a new attachment

![Image of file selection dialog]

**Title **

Claim NC-002 invoice

**Description**

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

5. Give the attachment a title for example the name of the claim the attachment is related to.
6. If required you can add further details in the description e.g. Photo of complications
7. Then Click Save and upload. If you decide not to attach the file you can skip this step to not add the attachment.
c. **Adding/Removing Claims on a Batch**

The claims section shows any claims currently in this batch and any claims available to be added to the batch.

1. To add claims tick the add box on all the claims you wish to add:

   **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 tick 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.

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 claim.

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 and Save and submit buttons]

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]

3. **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 and in a batch skip steps 1 and 2**

1. Log in to the system.
2. Navigate to 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 as draft and Save and submit buttons]

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:

<table>
<thead>
<tr>
<th>Last update</th>
<th>Batch no</th>
<th>Practice</th>
<th>Vet</th>
<th>Status</th>
<th>Num claims</th>
<th>Attachments</th>
</tr>
</thead>
<tbody>
<tr>
<td>05/07/2017</td>
<td>NB-00004</td>
<td>Brookfield Vets</td>
<td>Jake Bugg</td>
<td>Submitted</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>24/05/2017</td>
<td>NB-00003</td>
<td>Brookfield Vets</td>
<td>Jake Bugg</td>
<td>Submitted</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>03/05/2017</td>
<td>NB-00002</td>
<td>Brookfield Vets</td>
<td>Jake Bugg</td>
<td>Submitted</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>25/04/2017</td>
<td>NB-00001</td>
<td>Brookfield Vets</td>
<td>Jake Bugg</td>
<td>Draft</td>
<td>2</td>
<td>1</td>
</tr>
</tbody>
</table>

Submitting the batch will also update the status of any claims contained in the batch to Submitted.
8. Making Amendments to Rejected Batch

When you navigate 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.

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 save and submit as normal.