# Quick Reference Guide

## STEP 1: PRE-APPROVAL

1. Via VetPay Website, click on Practitioners Login and log in with your clinic details
2. Enter client's first and surname to search the data base
3. To access an existing client account, enter PIN or Date of Birth 'CONTINUE' if client not found click 'Add Client'
4. Enter client's details and 'Save'
5. Print Privacy Statement when prompted and have client read and sign
6. Click 'Privacy Statement Signed'

✔ Pre-Approval complete. Request a 'Call Back' if a credit limit increase is required.

## STEP 2: ADDING TREATMENT COST

1. Search client with first and surname to check available credit
2. Select your client, enter PIN and 'CONTINUE'
3. 'ADD TREATMENT' enter pet's name, total treatment cost, deposit (if applicable) 'CONTINUE'
4. Choose a payment method; system will default to direct debit. Click on credit card to change payment method
5. Ask client for bank details - if not automatically populated to their account 'Print and Save'
6. 'Print' receipt provide to client

Please remind client that should they have any questions with regards to their plan they can contact VetPay directly

## STEP 3: UPLOADING INVOICE

1. Scan Invoice to your desktop (suggestion: have a VetPay folder on your desktop to save files)
2. Select 'ADMIN' Tab
3. Select 'Search Type: Document Manager'
4. Enter client's name, select 'Search' and click on your client's name
5. Click 'Select' to search for document and attach your chosen document

**At any time should you require assistance phone our 24hour support line or use the Call Back tab.**
***** If Client has forgotten their PIN, please call VetPay for PIN to be re-sent to the Account Holder**

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