

Eaglesoft + Vyne Trellis User Basics

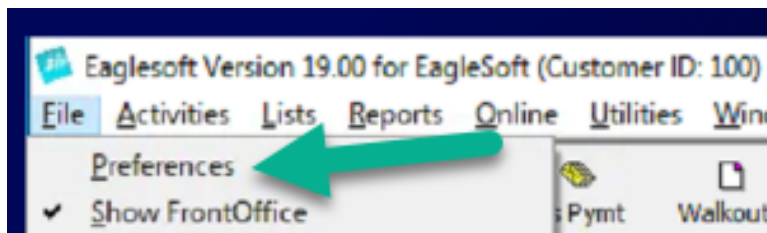
(Vyne Dental Plugin)

How to send claims to Vyne Trellis using Vyne Dental Plugin

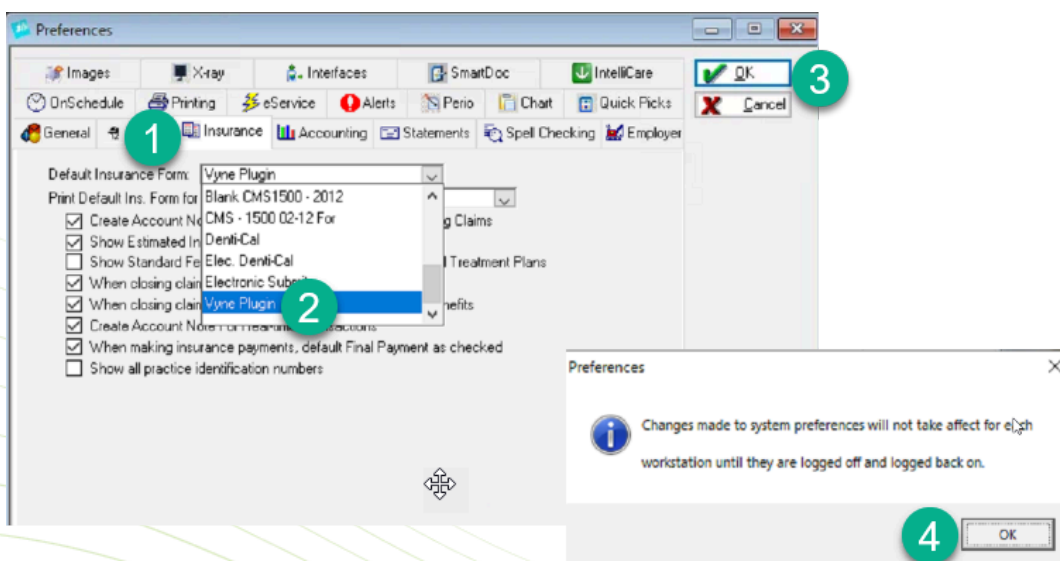
By now, you've installed the Vyne Dental® Plugin and you are ready to configure Eaglesoft and start sending claims!

I. Configuration

1. Open Eaglesoft and choose **File** and **Preferences**:



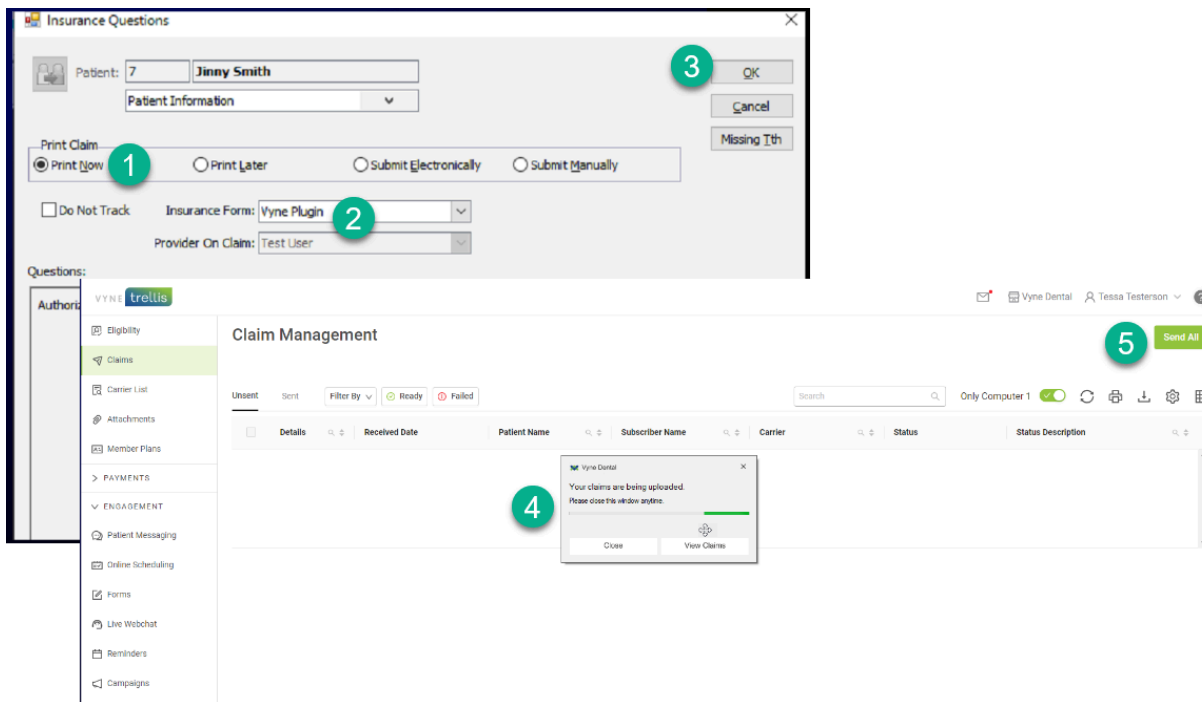
2. Click on the **Insurance** tab in Preferences, and update the Default Insurance Form to Vyne Plugin and Click **OK**. You will be prompted to log off and back on to save your changes.



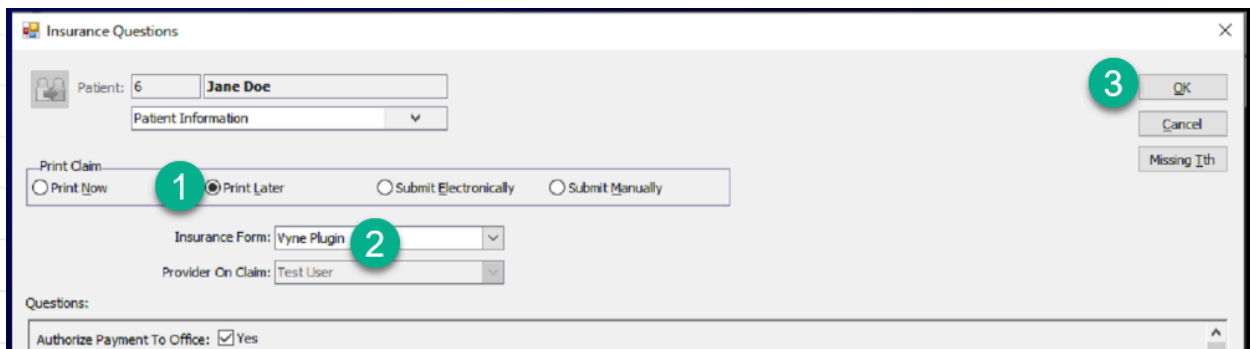
II. Send claims from Eaglesoft to Vyne Trellis

Option 1: You can choose **Print Now** to individually send claims. Ensure that the Insurance Form in Eaglesoft is set to **Vyne Plugin**, and click **OK**. The individual claim will be uploaded to Vyne Trellis:

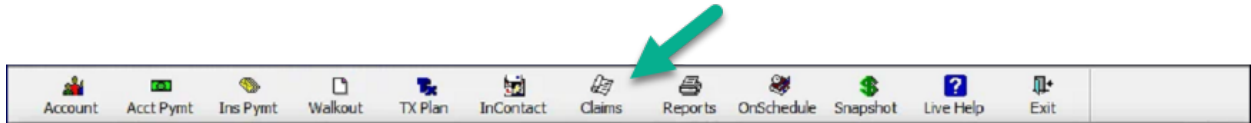
*Don't forget to click **Send All** in the upper right corner within Vyne Trellis, this is the final step to getting your claims sent to insurance!*



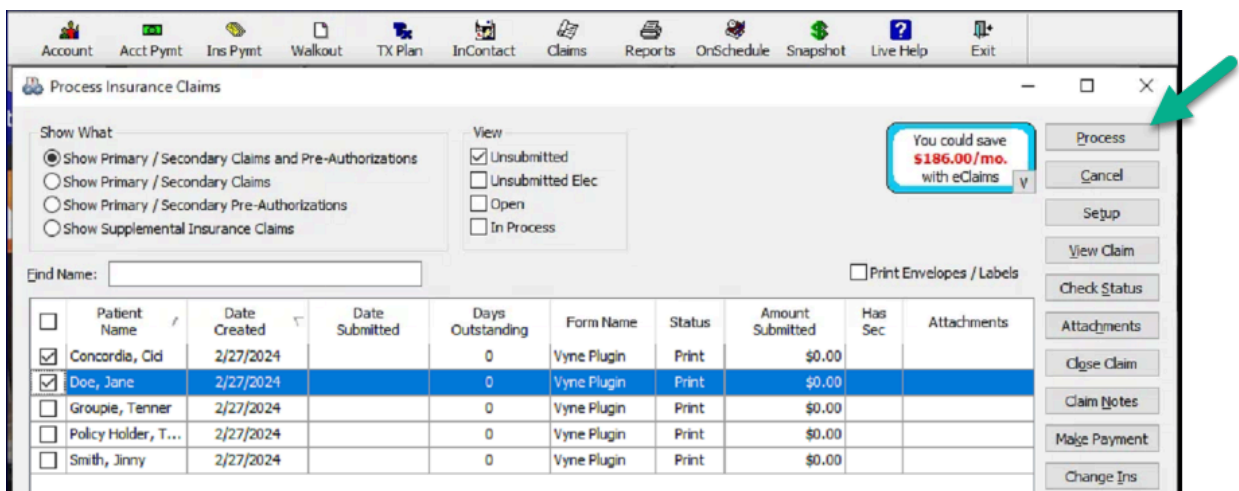
Option 2 (suggested): Choose **Print Later** on the Change Answers window. Ensure that the Insurance Form is set to **Vyne Plugin** and click **OK**.



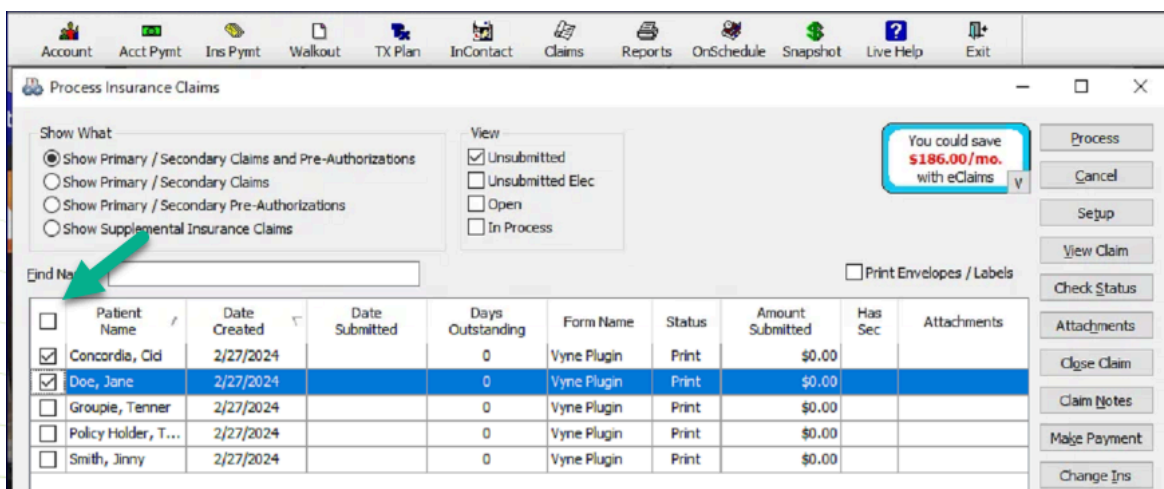
1. When you are ready to transfer the batch of claims to Vyne Trellis, click on the **Claims** icon



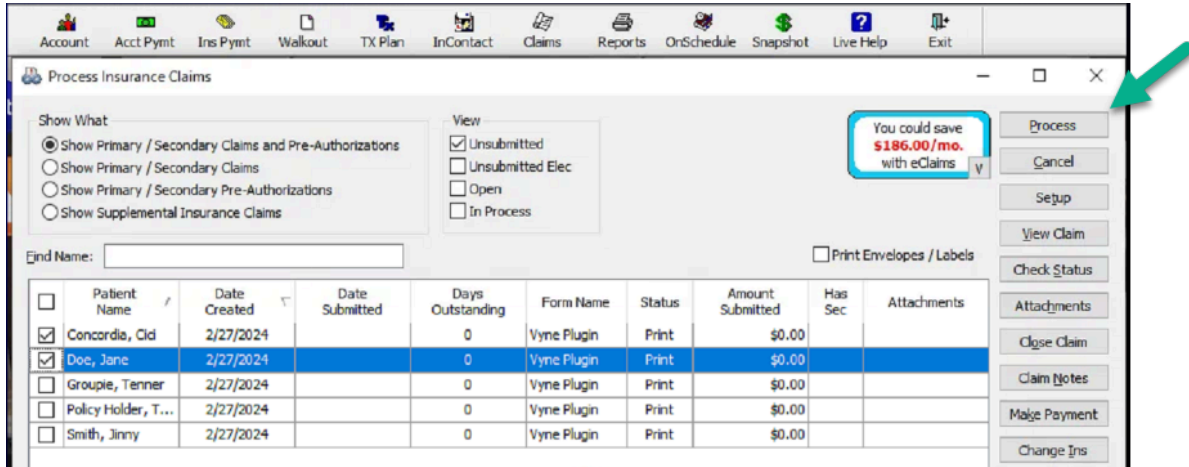
2. Ensure that the claims you want to send have the **Vyne Dental** or **Print RES** form in the **Form Name** column of the **Process Insurance Claims** window



3. **Mark** the claims you want to send to Vyne Dental

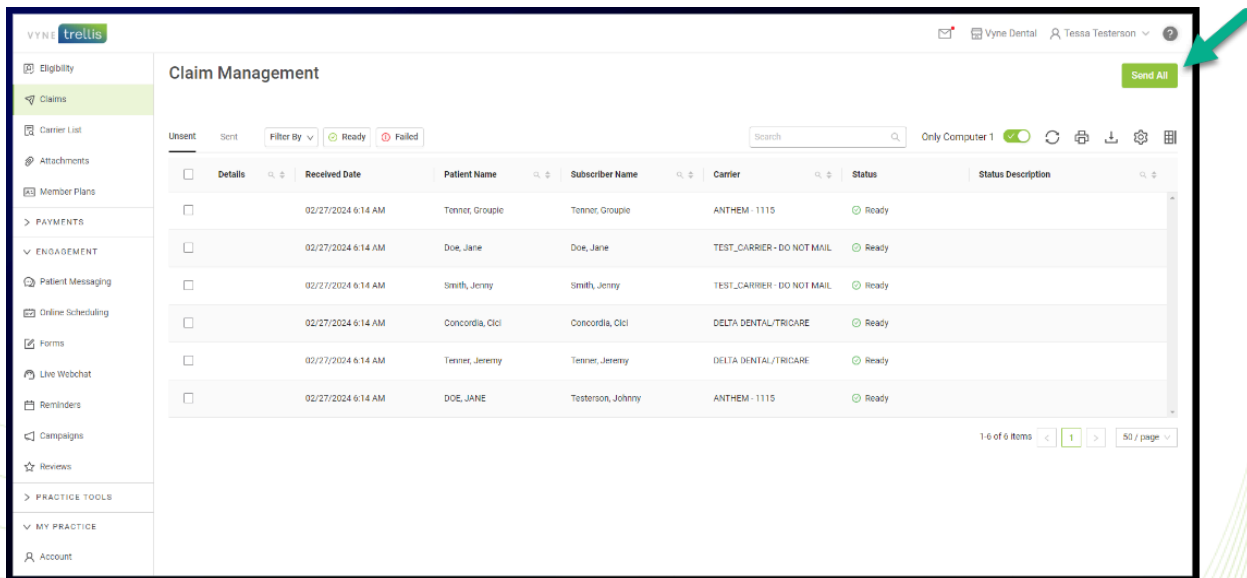


4. Click **Process** in the **Process Insurance Claims** window.



5. All of the selected claims will be available in Vyne Trellis as Unsent Claims.

*Don't forget to click **Send All** in the upper right corner within Vyne Trellis, this is the final step to getting your claims sent to insurance!*



How do I track my claims after I send them to insurance?

You can track your claim status in Vyne Trellis.

After clicking send or Send All to process your claims in Vyne Trellis, they will show up in the **Sent** tab of Vyne Trellis. Here you can track claims to see if they were accepted or rejected by insurance.

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