

Move documents

*There will be times when you want to move one or more documents from one party to another, or from one claim to another. Documents that have a contact associated with them must be moved from the **Contacts** tab.*

How to: Move documents

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- [Move the contact from the claim](#)
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- [Move to a new claim](#)
- [Move a document \(no contact associated with it\)](#)
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Staff roles with security access to move a document, or move a contact associated with a document are restricted by delegation.

Moving contacts doesn't apply to emails filed away to Eos using Email Toolset, for more information see email toolsets 'File an inbound email' page.

If a document is included in a Bulk Print and it is moved the details in the Bulk Print contents page will update the Claim ID to reflect the new location of the document.

Move a document that has a contact associated with it

This action moves both the contact and the document to a new party and or a new claim.

This activity is restricted by delegation.

Move a contact from the claim and keep the contact linked to the original party, but NOT to any claim

Step 1

Open the claim or party record and go to the **Contacts** tab.

Step 2

Select the contact associated with the document and click **Move**.

Step 3

Click '**Clear the Case**'.

Leave the party selection as '**Remain linked to current Party**'.

Move contacts - remain linked to current party TS [REDACTED]

Click OK in the resulting pop up window.

Move both the contact and the document to the new party

Step 1

Open party record and go to the **Contacts** tab.

Party **Contacts** Tab to move TS XXXXXXXXXX

A Buzz Lightyear
 This client has selected an alternate contact method/person for their Sensitive Claim
 Customer Number [Redacted]

Party Details
 Edit Party Merge Party Add Contact Add Activity Add Activity Email

General Claims Contacts Documents Tasks Indicators Prompts Relationships Health and Living Complaints LSIA View

Contact Summary

Date/Time	Direction	Reason	Method	Description	Claim Number	
06/10/2015 15:57	Incoming	Please Select	Please Select		ACC45	Add
06/10/2015 15:36	Incoming	Contact With Employer	Original		ACC45	Open
06/10/2015 15:18	Incoming	Please Select	Please Select		MIS-INT ISSC Inte	Remove
05/10/2015 15:56	Outgoing	Referrals/Approvals	Original	9332046	TMT Treatment	Move
02/10/2015 15:16	Outgoing	Case Conference	Phone	ISSC Case Conference completed w	MIS-INT ISSC Inte	History
02/10/2015 13:34	Outgoing	ISSC Initial Contact	Phone	Initial Client Contact completed	ACC45	

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Contact Details

Reason: Please Select
 Direction: Incoming

Description: Deal with by
 Party Claim: Buzz Lightyear - ACC45 Claim
 Sample User - Business Technology Group

Associated Documents

Date/Time	Status	Document Type	Description	
06/10/2015 15:57	Received	COM01 Findings - client	sdafasdrffa	Open

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Close

Select the **contact**. To move contact to:

- a new party and then a new claim go to Step 3.
- another claim for the same party go to [Move a document to a new claim](#).

Step 3

Click **Move**.

Step 4

Click 'Move to another party' then the **magnifying glass** (search icon) and select the new party.

Move to another Party - Party Search TS 

Party Search - Windows Internet Explorer provided by BT Group

Env 14 - BAU1509.0.3 - About ZUser Two

EOS

Home Create Claim Open Party Open Claim Archive Claims Entitlement Types CHIPS Help

Recent Tasks Claims

A Buzz Lightyear

Customer Number [Redacted]

Party Search

Claims Person Person ID Provider/Vendor/Facility Employer Business Group Other Organisations Recent

Case Type: ACC45 Claim Case Number: [Redacted]

Participants

Name	Role Name	Start Date	End Date	View Party
Buzz Lightyear	Claimant	07/09/2015		Edit
Buzz lightyear	Authority to Act	31/10/2015		Add
Dr / [Redacted]	Claim Lodgement - Provider	07/09/2015		

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OK Cancel

Step 5

Click OK to move both the contact and document to the new party.

Move a document to a new claim

Step 1

Open claim or party record and go to the **Contacts** tab.

Step 2

Select the contact associated with the document and click **Move**.


Step 3

Click **'Move to another Case'** then the **magnifying glass** (search icon) and select the new claim.

Step 5

In the **Move Contacts** screen, both the party and the claim are selected.

Click **OK** to display the confirmation screen, the contact and its related document is now associated with the specified claim.

Move Contacts - Final Screen TS 

A Buzz Lightyear

Customer Number [Redacted]

Move Contacts

Date/Time 06/10/2015 15:57

Description
Current Party
Buzz Lightyear

Contacts
Claim Number
[Redacted] - ACC45 Claim

OK

Cancel



Party

- Move to another Party
- Remain linked to current Party

Claim

- Move to another Case
- Clear the Case
- Remain linked to current Case

1-1 of 1

OK

Cancel

Move a document with no contact associated with it

When moving a document with no contact attached to it, you will use the Documents tab.

Step 1

Open claim and go to the Documents tab, then Documents for Claim sub-tab.

Step 2

Select the document(s) from the document list. You can tick the box, use the **MultiSelect** icon or [CTRL]+Click to move more than one item.

Step 3

Click **Move**.

Step 4

Click **'Move to another Party'** to move the document to a new party or **'Move to another Case'** to move the document to a new claim.

Step 5

Click the magnifying glass (search icon). Enter the relevant details and click **Search**.

Click **OK** to move the document(s) listed. A confirmation screen will pop up advising that records have been moved. Click **OK**

Tips

- Delegation is required to move a contact and/or document from a claim or party: registration officers, administration officers, team leaders, team managers, executive officers, technical claims managers and quality assurance managers.
- Case owners can move documents and contacts from one claim to another, provided the claims belong to the same party. The case owner role covers: claims officer assessments, claims officer treatment, claims officer entitlements, VIP case manager, case administrator, case co-ordinator, case manager, claims manager and lifetime rehabilitation planner - senior support co-ordinator.
- Delegation is required to remove a contact and/or document: business unit managers and team managers.
- Delegation is required to move documents with a 'Complete' status: business unit managers, team leaders - administration and executive officers.
- If a document is linked or associated to another group and is moved from one claim to another, it will remain in the document group for the original claim.