

Manage document groups

You will need to manage document groups when you want to identify a combination of claim documents that were used for an entitlement decision or for grouping documents to then print as a pack (e.g referral to a specialist). This includes adding, editing, printing (emailing) and removing document groups.

Note: *A Bulk Print document is added to the VCF Bulk Print document group on creation. Only Bulk Print documents can be in this group. This document group can't be removed.*

How to:

- [Add a document group](#)
- [Add new documents to a group](#)
- [Link existing documents to a group](#)
- [Edit a document group](#)
- [Remove a document group](#)
- [Print a document group](#)
- [Tips](#)

Add a document group

Step 1

Open the claim and go to the **Documents** tab then the **Document Groups** sub-tab.

Document Groups Tab View TS 

ACC45 # ACC45 Date of Birth 14/07/1980
Status Registration Complete
Close

Case Details
* ACC32 QE * Surgery QE * General QE * General + QE * Add Contact * Add Document * Add Sub Case * Add Activity * Add Document * Add Document * Transactions * Email

General Entitlements Plan Managing Contacts Documents Tasks InjURY Medical Employment Transactions

Documents for Claim Document Groups

Date/Time	Name	Description
22/09/2015 13:42	VCF Bulk Prints	

1-1 of 1

Add Edit Remove

Date/Time	Party/Claim	Status	Document Type	Description
25/09/2015 14:13	[REDACTED]	Complete	VCF Bulk Print	Internal Referral - DO NOT RELEASE
23/09/2015 08:36	[REDACTED]	Complete	VCF Bulk Print	Information Request - Client
22/09/2015 13:49	[REDACTED]	Complete	VCF Bulk Print	Dispute - Client - test
22/09/2015 13:42	[REDACTED]	Complete	VCF Bulk Print	Information Request - Client - Test

1-4 of 4

Add Open Properties Print Doc(s) Link UnLink Email

Documents in Groups

Close

Step 2

Click Add next to the Document Groups section.

Create Document Group Page TS

Env 14 - BAU1509.0.3 - About ZUser Two

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

Recent Tasks Claims

EOS

ACC45 # ACC45 Claim Buzz Lightyear

ACI Date of Birth 14/07/1980

Create Document Group

Create new document group linked to

General

Name Description

Status Registration Complete

OK Cancel

OK Cancel

Case Summary

Step 3

Select a name of the document group from the dropdown list. Make sure your **Description** will help you identify the purpose for the **Document Group**.

Step 4

Click **OK** to display the group in the **Document Groups** list.

Add new Documents to a Group

Step 1

Open the claim and go to the **Documents** tab then the **Document Groups** sub-tab.

Step 2

Select the group to add documents to and click **Add** next to the **Documents** in **Group** section.

Step 3

In the **Document Type Folder**, search and select the new documents to be added to the group and click **OK**.

Choose a **Document Type TS** ██████████

Choose a Document Type

Document Type Folders

- Document Type Folders
 - CaseNoteEntries
 - Sensitive Claims
 - Category
 - Branch
 - Complaints
 - Contact Centre
 - Elective Surgery Unit
 - Inquiry Service Centre
 - Processing Centre
 - Sensitive Claims
 - Service Centre
 - Service Centre - Accidental Death

Document Types

- Business Type
 - Metadata Upload
 - Upload Document

Description

Metadata capture for inbound Upload Document

ACC45 Claim

- Ancillary Services
- Hearing Loss
- Weekly Compensation

Participants

- Claimant
 - Buzz Lightyear
- Claim Lodgement - Provider
 - Dr [Redacted] Add Participant

Summary Information

- Date Of Accident: 02/09/2015
- Lodgement Date: 07/09/2015
- WC Start Date: -
- Claimant Age: 35
- Claimant Occupation: Heavy Truck Driver
- Injury Description: Ankle sprain, Contusion, kna
- RTW Target Date: -
- WC Days Paid: 0

Ownership

- Case Owner: Sample User Transfer Case

- The new documents are added to the claim and the document group which now displays on the **Documents for Claim** sub tab.

Link existing documents to a Group

Step 1

Open the claim and go to the **Documents** tab then the **Document Groups** sub-tab.

Step 2

Select the group to add documents to and click **Link** next to the **Documents in Groups** section.

Documents - Document Groups - Link TS [REDACTED]

Date/Time	Party/Claim	Status	Document Type	Description
22/09/2015 13:42	VCF Bulk Prints			
06/10/2015 15:57	General			

Step 3

Search for the record (i.e. Claim, Party or Employer) that you want to link documents from.

Document Search to link to Document Groups TS [REDACTED]

Document 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 ACC45 Claim [REDACTED] Buzz Lightyear [REDACTED]

ACC45 # AC [REDACTED] Date of Birth 14/07/1980

Document Search

Claim Party Employer

Claim Number / ACC45 Number [REDACTED]

Display Sub-Cases

Search New Search

Case Summary Status Registration Complete OK Cancel

Step 4

Select the relevant Party and click OK to display the documents in the Document Groups tab.

Edit a document group

Step 1

Open the claim and go to the **Documents** tab then the **Document Groups** sub-tab.

Step 2

Select the group from the **Document Groups** section. Click **Edit**.

Step 3

Make your changes and click **OK**.

Print a document group

Step 1

Open the claim and go to the **Documents** tab then the **Document Groups** sub-tab

Step 2

Click **Print Doc(s)** in the **Documents in Groups** section to see the documents that can be included in a Bulk Print.

Step 3

Click **Print All** or **Add to Print** to create your Bulk print.

- You can then either print the PDF or forward the PDF email to the client, and/or their representative.

Note that Bulk Print documents are not considered 'Completed' documents so will not appear in the Print Documents tab. Going from the Documents Group for VCF Bulk Print to the Print Documents screen results in an empty Print Documents view.

Remove a document group

Step 1

Open the claim and go to the Documents tab then the **Document Groups** sub-tab.

Step 2

Select the group to be removed in the **Document Groups** section and click **Remove**.

Step 3

Click **Yes** to confirm and delete the document group.

Tips

- When a document group is removed, the documents themselves are not removed from the claim – just the group.
- You can either print the document group or forward the document group as an email to the client, and/or their representative.
- When a new Bulk Print document is generated a new VCF Bulk Print document group is be created.