Secure a document

Documents in Eos can be secured so that they don't print out when the claim file is printed for review or for other purposes.

How to:

- Secure a document
- Tips

To secure hard-copy or electronic documents you must select the 'Secured' Security Level option at the time you are completing the Metadata Capture screen (hard-copy) or Upload a new document screen (electronic), as once the documents are in the system with a status of either 'Received', 'Signed' or 'Complete' the document properties cannot be edited.

If the Document Type 'Legally privileged advice/ documents' is selected the Security Level defaults to 'Secure'.

Secure a document

Step 1

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

Step 2

Select an existing document from the list and click **Properties.**
- Note that if you are generating the document, you can edit the **Document Properties** screen either before or after the document is generated.

Document Properties TS██████

NOTE: See Appendix One – Eos ACC45 Claim

Step 3

Select the relevant option from the **Security Level** dropdown box. Click **OK**.

Tips

- Documents with 'Secured' security level status will not be included in **Print Doc(s)** or **Print All** functions in the claim record.

- If Eos times out before the **OK** button has been clicked, the document is not sent to VCF for storage but stored on the network file system. To access the document, go to the Documents List on the **Documents** tab of the claim or party record.