

About documents in Eos

*Documents can be created and managed at both **claim** and **party** level.*

In most cases, a document will relate specifically to a claim, so it should be created on the claim record.

Some document actions automatically generate a contact record in EOS:

- *documents created in Eos*
- *electronic documents uploaded into Eos*
- *hard-copy documents logged into Eos.*

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Generate documents

New documents are generated from templates in EOS. These templates provide default text for the document and enable Eos to populate information for you.

Log hardcopy documents

When you receive a hard-copy document (e.g. a client completes and returns a form), you need to:

1. Obtain and attach a barcode sticker.
2. Log the document in Eos.
3. Send the document for scanning.

See [Log a hard copy document](#) for further information.

Upload documents

You will occasionally receive claim-related documents electronically (including files attached to an email) that other staff will need to look at. The Upload function lets you find the document on the network and upload it into Eos.

Never upload documents relating to sensitive claims, as they will be visible to all staff at party level.

See [Upload an electronic document](#) for further information.

Open documents

How a document opens depends on the type of document and its status.

If a document is ...	it will open as ...
an electronic form	an Eos screen.
saved as 'Incomplete'	a Word document for editing.
saved as 'Complete'	a PDF in Acrobat Reader. Note: You will not be able to edit it.

See [View documents](#) for further information.

Print documents

Documents in Eos can be printed using the standard Word and Acrobat Reader Print icon.

You can print all documents on a claim file by clicking the **Print Doc(s)** button that opens the **Print Documents** screen. This screen shows documents that have a status in the 'complete' subset; Completed, Signed and Received.

The Print Documents screen has the following options;

- **Print All button.** Eos will create a PDF with all of the 'complete' documents on the claim.
- **Add to Print with Print button.** Eos will produce a PDF with the user selected documents.

Eos automatically sends you a link to the PDF by email. You can only access the document from this link within the following 24 hours, so it is a good idea to click on the link and save the document when you receive the email.

See [Print documents](#) for further information

Secure documents

Documents with a security level of '**Secured**' will not appear in the generated PDF document for printing or on the list of available documents if the **Print Doc(s)** button is selected.

Therefore, if you don't want a specific document to be included when the claim file is printed, set the **Security Level** field for the document to '**Secured**'. If the Security Level is '**Unsecured**' or '**Not Selected**', the document will be included when the claim file is printed.

See [Secure a document](#) for further information.

Document status

Documents have a status assigned to them that determines the actions that can be taken on that document.

Status	Use this status when you...
Incomplete	<ul style="list-style-type: none">generate a document in Eos and you still want the ability to edit its contenthave not printed or sent the document yet.
Complete	send a document to its recipient. Note: You cannot change a document with a status of 'Complete'.
Received	receive and log a hard-copy document from an external party. Note: This status is equivalent to 'Complete'.
Signed	receive and log the signed copy of a rehabilitation plan – IRP, LTRP or ICP – or documents that have a legal standing (e.g. ACC6300 - Authority to collect medical and other records, ACC174 - Declaration of Responsibilities or ACC261 - Rehabilitation Rights and Responsibilities). Note This status is equivalent to 'Complete'.
Cancelled	create a document and then decide it is not required (e.g. it was created in error). Note The document must have 'Incomplete' status to allow it to be cancelled.
VCF Error	System set status. Occurs when a permanent fault is experienced while transferring a document to VCF. Resolving this issue will fall to Applications Support. They will receive notification when this fault occurs.

