

Cancel, delete or remove a document

Use these instructions to delete, cancel or remove a document from a claim and/or a party record.

Only business unit and team managers have system rights for removing a document. The 'Remove Document' button is disabled for other users.

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When a document is created from or uploaded into Eos, a contact associated with the document is automatically created.

Documents are physically removed from Eos by removing the associated contact. The 'Remove Contact' function is only available in a party record. Before removing a document associated with a claim record, the relevant contact must be moved from the claim record to the party record so that the contact can be removed. This ensures the automatic removal of the related document. Note that if you create an incorrect document, you can delete it during the generation process. The 'Document Properties' screen will be open.

Delete a document

Quick steps

1. Open party record and go to the **Documents** tab
2. Select the document. Click **Properties**

3. Click **Delete**

4. Click **Yes**

- Note: You can't delete a **Bulk Print** document

Step 1

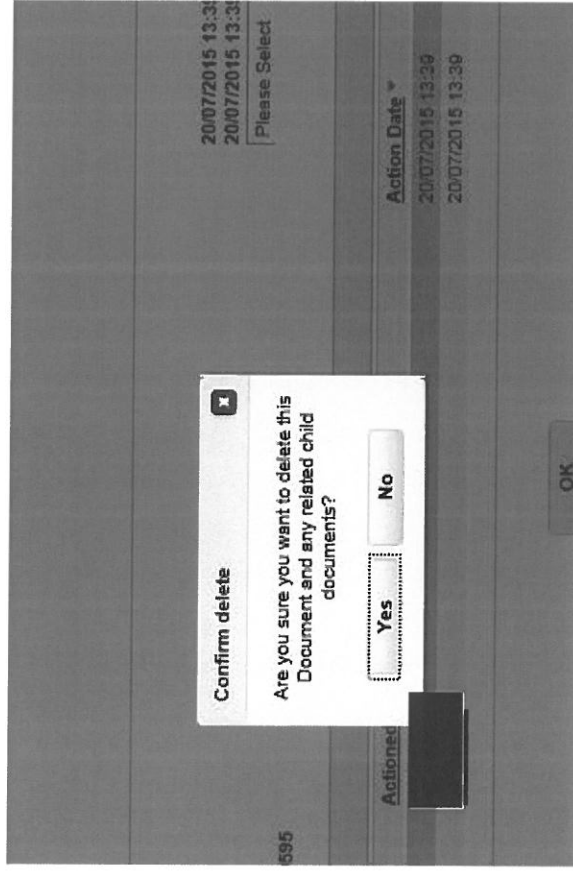
Open the party record and go to the **Documents** tab. Select the document and click **Properties** to open the 'Document Properties' screen.

Documents - Party - Documents Remove TS [REDACTED]

Step 2

Click Delete. A confirmation window will appear.

Documents - Confirm Delete Message TS [REDACTED]



Step 3

Click Yes to confirm and delete the document.

Note: You can't delete a Bulk Print document

Cancel a document

Quick steps

1. Open claim and go to the **Documents** tab
2. Select the document. Click **Properties**
3. Select **Cancelled** from the **Document Status** menu. Click **OK**
4. Go to **Contacts** tab
5. Select contact related to the document you have cancelled
6. Click **Open**
7. Record any relevant details in the **Description** field
8. Click **OK**. The document has been cancelled

- Note a document can only be cancelled if the current status is set to **Incomplete**. **Bulk Print** documents can't be cancelled

A Document can only be cancelled if the current status is set to **Incomplete**. You can't cancel a Bulk Print document.

Step 1

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

Step 2

Select the document and click **Properties**.

Step 3

Go to the dropdown list next to the Document Status field and select 'Cancelled'. Click OK.

The document's status will now show as 'Cancelled' on the Documents for Claim sub-tab.

Documents - Status Cancelled TS [REDACTED]