Contact

Contact reasons and recommended use

When adding or editing contact details you are required to select a reason for doing so.

Contact Reasons and recommended use

The following is a list of reasons available from the **Add Contact Reason** drop down box.

Contact reason	Recommended use
ACC 2152	ACC2152 Treatment Injury Claim form received or requested (TI & PS only)
Claimant Care Notes	Secures the contact Used for contacts that relate to risky clients
Clinical Records	Contacts that relate to request for or receipt of clinical records (TI & PS only)
Complaint	Contacts that relate to complaints
Consent/Disclosure	Contacts that relate to received consents, authorities to act
Contact with Claimant	Contact with the client where no other reason is appropriate
Contact with Employer	Contact with the employer where no other reason is appropriate and the Party is not being changed
Contact with Internal Party	Internal (ACC employees) contact
Contact with Other Party	Contact with non-Eos parties, where the Party is not being changed
Contact with Provider	Contact with the provider, where the Party is not being changed
Counselling	Contacts that relate to sensitive claims

Contact reason	Recommended use
Data Integrity Check	Levy and scheme management (adding/updating CU for pricing and forecasting)
Debt	Contacts that relate to debt deduction or recovery
Decision Letter	Provision of decision with review rights
Dental	Contacts that relate to dental claims
Dispute	Contacts that relate to the review process
Experience Rating	Contacts that relate to experience rating
External Clinical Advice	Contacts that relate to external clinical advice received or requested (TI & PS only)
Forms	Forms that have been provided
IA/Lump Sum Enquiry	Contacts that relate to the IA/LS process
KiwiSaver Info Pack Request	Requests for information about KiwiSaver deductions
Medical	Contacts that relate specifically to medical matters
Medical Certificate	Identifies receipt of medical certificates
Referrals/Approvals	Indicates MFP referrals/approvals
Request for Entitlement	Identifies ACC01, ACC250, etc
Request for Information	Identifies requests from other insurers, client requests for copy file, etc
Social	Contacts that relate specifically to social entitlements, service provision, etc
Timeout Cover	Contacts that relate to timeout cover for weekly compensation
Triage	Contacts that relate to the triage process
TM Review	Identifies that TM has reviewed the file or specific matter on the file
Vocational	Contacts that relate specifically to vocational entitlements, service provision, etc
Weekly Compensation	Contacts (usually internal) that relate to weekly compensation entitlement set up and management

Edit a Contact

Use these instructions to open, edit or move a Contact.

Contacts are used to record details of communications with external parties. It's important to record contacts so that other staff members are able to see all of the communications relating to a claim or party.

Contacts can be phone calls, emails, letters, etc. They may be associated with a party because the communication was with a party or it concerned a party. All contacts that have been attached to a party and/or claim are displayed on the Contacts tab.

Keep in mind that when you move a contact, any associated document linked to that contact will be moved at the same time.

Contacts are not used for communication with an internal party; instead, assign a task to the relevant party that he or she can update.

How to:

Open and edit a contact

Step 1

Open the claim and go to the **Contacts** tab.

Step 2

Select a contact from the Contact Summary list view and click **Open.**

Edit Contact in Open Mode TS[redacted]

Eos

Recent ▾ Tasks Claims

Env 14 - BAU1509.2 - About Sample User ▾

Home | Create Claim | Open Party | Open Claim | Entitlement Types | CHIPS | Help

A ACC45 Claim [redacted] Buzz Lightyear [redacted]

M P

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, kne ▸

RTW Target Date
-

WC Days Paid
0

Ownership

Case Owner
Sample User [redacted]

Transfer Case ▾

ACC45 # AC[redacted] Date of Birth 14/07/1980 Status Registration Complete

Edit Contact

OK | Cancel

Contact Details

Reason	Forms	Party	Buzz Lightyear
Direction	Incoming	Claim	HL-[redacted] Hearing Loss
		Method of Contact	Please Select
Description	Description		

Creation Details

User	Sample User - [redacted]	Date/Time	21 SEP 2015 10 : 44

List of Documents

Date/Time	Status	Document Type	Description

No Records To Display

Open

Contact History

Description	Actioned By	Action Date
Set Privacy Tag to Unknown	[redacted]	21/09/2015 10:45

1-1 of 1

OK | Cancel

Step 3

Edit the details and click **OK** to save and close the contact.

- Any claim record or associated document that is linked to this contact record can be viewed from this screen.
- Party and Claim records can be viewed (in read-only format) by clicking the hyperlinked party name or claim number. The record will open in a new window.

Change the contact party

Step 1

Open the claim and go to the **Contacts** tab and click **Add.**

Step 2

Under **Contact Details,** go to the **Party** field and click the **magnifying glass** (search icon) next to the party name to open the **Party Search** screen.

Step 3

Click on the relevant tab for the party category (**Claims**, **Person, Person ID, Provider/Vendor/Facility, Employer, Business Group, Other Organisation, Recent**).

EOS

Recent ▾ Tasks Claims

Env 14 - BAU1509.2 - About ZUser Two ▾

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

ACC45 Claim [redacted] Tessa Test [redacted]

M P

Participants

Claimant
Tessa Test

Claim Lodgement - Provider
Dr [redacted]

Employer - Default
[redacted]

Add Participant ▾

Summary Information

Date Of Accident
03/09/2015

Lodgement Date
21/09/2015

WC Start Date
-

Claimant Age
24

Claimant Occupation
Cattle Farmer

Injury Description
Open fracture-subluxation, ▸

RTW Target Date
-

WC Days Paid
0

Ownership

Case Owner
Actioned Cases - Hamilton REG

Transfer Case ▾

ACC45 # LM[redacted] **Date of Birth** 02/09/1991

Status Registration Complete

Party Search

OK Cancel

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

Participants

Name	Role Name	Start Date	End Date
Tessa Test	Claimant	21/09/2015	-
Dr [redacted]	Claim Lodgement - Provider	21/09/2015	-
[redacted]	Employer - Default	21/09/2015	-

View Party
Edit
Add

1-3 of 3

OK Cancel

Step 4

Enter the search information and click **Search** then Select a record and click **OK.**

Step 5

In the **Add Contact screen**, select the reason for the change from the **Reason** dropdown box.

EOS

Recent ▾ Tasks Claims

Env 14 - BAU1509.2 - About Sample User ▾

Home | Create Claim | Open Party | Open Claim | Entitlement Types | CHIPS | Help

A ACC45 Claim [redacted] Buzz Lightyear [redacted] M P

ACC45 #   AC[redacted]   Date of Birth   14/07/1980   Status   Registration Complete

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, kne ▸

RTW Target Date
-

WC Days Paid
0

Ownership

Case Owner
Sample User [redacted]

Transfer Case ▾

Add Contact

OK Cancel

Contact Details

Reason Please Select ▾
Direction Incoming ▾
Description

Party Buzz Lightyear
Claim [redacted] - ACC45 Claim
Method of Contact Please Select ▾

Creation Details

User Sample User - [redacted]

Date/Time 21 SEP ▾ 2015 09 : 17

List of Documents

Date/Time	Status	Document Type	Description

No Records To Display

Open

OK Cancel

See Contact reasons and recommended use for a full list of reasons.

Step 6

Enter the relevant contact details and click **OK.**

Move contact record(s) to another party

Quick steps

1. Open claim. Go to the **Contacts** tab

If moving a *single* contact then select it and go to Step 2

If moving *multiple* contacts select them all and go to Step 6

2. Click **Open**
3. Go to **Contact Details** then the **Party** field. Click **magnifying glass** next to party name
4. Go to relevant tab for party category. Select new party. Click **OK**
4. Confirm party is correct. Click **OK**
6. Click **Move**. Select the **Move Option**
7. Click **magnifying glass** next to **Move to Another Party** to find party to move contacts to
8. Select the party. Click **OK**
9. Click **OK**

Step 1

Open the claim and go to the **Contacts** tab.

- If you are moving a single contact then select the contact and go to Step 2.
- If you are moving multiple contacts select them all and go to Step 7.

Step 2

Click **Open** to display the **Edit Contact** screen.

Step 3

Under **Contact Details,** go to the **Party** field and click the **magnifying glass** (search icon) next to the party name to open the **Party Search** screen.

Step 4

Click on the relevant tab for the party category (**Claims**, **Person, Person ID, Provider/Vendor/Facility, Employer, Business Group, Other Organisation, Recent**).

Step 5

Select the new party. Click **OK** to display the new party name in **'Contact Details'** on the **Edit Contact** screen.

Step 6

Confirm that the chosen party is the correct one. Click **OK.**

Step 7

Click **Move** and use the radio buttons to select the appropriate move option in the **Move Contacts** Screen.

Move Contacts to another Party TS[redacted]

Eos

Recent ▾ Tasks Claims

Env 14 - BAU1509 2 - About Sample User ▾

Home | Create Claim | Open Party | Open Claim | Entitlement Types | CHIPS | Help

ACC45 Claim [redacted] Miss Matilda Mouse [redacted] M P

ACC45 Claim

- Cover Assessment
- Home and Living
- Treatment
- Vocational and Educational
- Vocational Rehabilitation and Independence
- Weekly Compensation

Participants

Claimant
Miss Matilda Mouse

Employer - Default
Default Proxy Employer for Registration

Add Participant ▾

Summary Information

Date Of Accident
16/06/2012

Lodgement Date
18/06/2012

WC Start Date
23/06/2012

Claimant Age
25

Claimant Occupation
Unemployed

Injury Description
Open wound of finger(s) or ▸

RTW Target Date
-

WC Days Paid
0

Ownership

Case Owner
Actioned Cases - Hamilton REG

Transfer Case ▾

ACC45 # HT[redacted] Date of Birth 10/09/1990

Status Registration Complete

Move Contacts

OK Cancel

Date/Time	Description	Current Party	Contacts Claim Number
20/05/2015 13:27		Miss Matilda Mouse	[redacted] - ACC45 Claim

1-1 of 1

Party

- Move to another Party -
- Remain linked to current Party

Claim

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

OK Cancel

Step 8

Click the **magnifying glass** (search icon) button next to the **Move to another Party** radio button to find and select the party you want to move the contacts to.

Step 9

Click on the party in the search results. Click **OK.**

Step 10

The new party shows next to the **Move to another Party** field. Click **OK.**

Move contact record(s) to another claim of the same party

Quick steps

1. Open claim. Go to the **Contacts** tab
2. Select record(s). Click **Move**
3. Select **Remain Linked to Current Party** in **Party** section
4. Select **Move to another Case** in **Claim** section
5. Click **magnifying glass** in **Claim** section
6. Enter claim details. Click **Search**
7. Select claim. Click **OK**
8. Click **OK**

Step 1

Open the claim and go to the **Contacts** tab.

Contact View within Case Details TS[redacted]

Eos

Recent ▾ Tasks Claims

Env 14 - BAU1509.2 - About Zuser One ▾

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

i A ACC45 Claim [redacted] Buzz Lightyear [redacted] M P

ACC45 Claim

- Ancillary Services
- Hearing Loss
- Weekly Compensation

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

Status Registration Complete

Case Details

Close

ACC32 QE | Surgery QE | General QE | General + QE | Add Contact | Add Activity | Add Document | Add Sub Case ▾ | Email ▾

General | Entitlements | Plan | Managing | Contacts | Documents | Tasks | Injury | Medical | Employment | Transactions

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, kne ▸

RTW Target Date
23/09/2015

WC Days Paid
0

Ownership

Case Owner
Sample User ([redacted]

Transfer Case ▾

Contact Summary

This case | This case and its subcases

Date/Time	Party	Reason	Method	Description	Direction
24/09/2015 12:57	Buzz Lightyear	Claimant Care Notes	Please Select	Test	Incoming
23/09/2015 14:07	Buzz Lightyear	Contact With Employer	Phone	Employer Return To Work Script Transcript - compl ▸	Outgoing
23/09/2015 11:50	Buzz Lightyear	Contact With Claimant	Phone	Initial Client Contact Script Transcript - comple ▸	Outgoing
23/09/2015 10:48	Buzz Lightyear	Please Select	Please Select		Incoming
23/09/2015 08:34	Buzz Lightyear	Please Select	Please Select		Incoming
22/09/2015 13:55	Southern Cross Hospitals ▸	Case Conference	E-mail		Incoming
21/09/2015 14:56	Miss Matilda Mouse	Social	E-mail	testing123testing123testing123testing123testing12 ▸	Outgoing

Add | Open | View | Move | History

1-15 of 15

Contact Details

Reason: Claimant Care Notes
Direction: Incoming
Description: Test

Party: Buzz Lightyear
Claim: [redacted] ACC45 Claim
Dealt with by: [redacted] - Sample User - Business Technology Group

Associated Documents

Date/Time	Status	Document Type	Description

No Records To Display

Open

Close

Step 2

Select record(s), to be moved and click **Move** to display the **Move Contacts** screen.

Step 3

Select the **'Remain linked to current Party'** radio button in the **Party** section and the **'Move to another Case'** radio button in the **Claim** section.

Remain linked to current Party and Move to another Case TS[redacted]

Eos

Recent ▾ Tasks Claims

Env 14 - BAU1509.2 - About   Zuser One ▾

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

I | A | ACC45 Claim [redacted] Buzz Lightyear [redacted] | M P

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, kne ▸

RTW Target Date
23/09/2015

WC Days Paid
0

Ownership

Case Owner
Sample User [redacted]

Transfer Case ▾

ACC45 # AC[redacted]   Date of Birth 14/07/1980   Status Registration Complete

Move Contacts

OK | Cancel

Date/Time	Description	Current Party	Contacts Claim Number
24/09/2015 12:57	Test	Buzz Lightyear	[redacted] ACC45 Claim

1-1 of 1

Party

- ( ) Move to another Party -
- (•) Remain linked to current Party

Claim

- (•) Move to another Case -
- ( ) Clear the Case
- ( ) Remain linked to current Case

OK | Cancel

Step 4

Click the **magnifying glass** (search icon) in the **Claim** section to display the **Claim Search** screen.

Step 5

Enter the claim details and click **Search.**

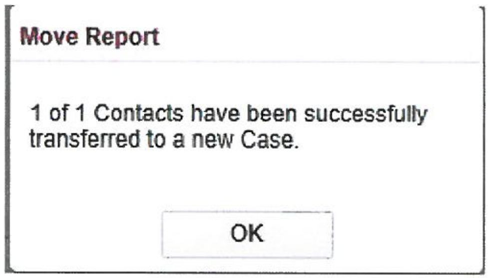
Step 6

Select the correct claim and click **OK** to display the correct claim in the **Move Contacts** screen.

Step 7

Click **OK.** You will receive a **Move Report** confirmation message.

Move Report TS[redacted]



Tips

- Remember that if a document is linked to a contact you are moving, the document will move at the same time.
- In the 'Contact Summary' list, the paperclip icon in the first column indicates an associated document. The 'Associated Documents' section displays these documents.
- Delegation required to move a contact 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 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.
- Contacts, and consequently documents associated with that contact, can only be removed from a record by business unit or team managers.
- Parties that have been marked as 'deleted' can be searched if the **Include Deleted** field is checked. Deleted parties can be viewed only; they are unable to be edited.
- Use the **Multi select** icon to select more than one consecutive contact, or **Ctrl+click** to select non-consecutive contacts from the list.

Move Contacts:

- **The Move Contacts** screen is used to move one or more contact records to another party and/or claim. When a contact is moved, any associated documents will also move with it. You can transfer the contact records to a new claim and a new party even if the new claim is not associated with the new party.
- Moving a contact means the contact record will no longer show up in the claim or party contact list it was moved from. If the contact is mistakenly moved to the wrong claim or party, it will be very difficult to find where it went. Users must take particular care that they are moving the contact to the correct destination.

View a contact

Use these instructions to view, filter or sort contacts, or to open a claim from a contact on a party record.

Contacts are used to record details of communications with external parties. It's important to record contacts so that other staff members are able to see all of the communications relating to a claim or party.

Contacts can be phone calls, emails, letters, etc. They may be associated with a party because the communication was with a party or it concerned a party. All contacts that have been attached to a party and/or claim are displayed on the Contacts tab.

Contacts are not used for communication with an internal party; instead, assign a task to the relevant party that he or she can update.

When adding a contact to a claim, the client is the default party for all new contacts.

How to:

- View a contact (at party, claim or rehabilitation action level)
- Filter the list of contacts
- Sort the list of contacts
- Open a claim from a contact record on a party
- Tips

View a contact

Step 1

Open the claim and go to the **Contacts** tab.

Step 2

Select a contact from the Contact Summary list view and click **View** to display the **View Contact** screen. Note this is read only.

View Contact TS[redacted]

Eos

Recent ▾ Tasks Claims

Env 14 - BAU1509.2 - About Zuser One ▾

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

i A ACC45 Claim [redacted] Buzz Lightyear [redacted] M P

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, kne ▸

RTW Target Date
23/09/2015

WC Days Paid
0

Ownership

Case Owner
Sample User [redacted]

Transfer Case ▾

ACC45 # AC[redacted] **Date of Birth** 14/07/1980 **Status** Registration Complete

View Contact

Close

Contact Details

Reason Contact With Employer
Direction Outgoing
Party Buzz Lightyear
Claim [redacted] ACC45 Claim
Method of Contact Phone
Description Employer Return To Work Script Transcript - completed

Creation Details

User Sample User - JOYCET
Date/Time 23/09/2015 14.07

List of Documents

Date/Time	Status	Document Type	Description
23/09/2015 14:07	Complete	Employer Return To Work Script Transcript	

Open

1-1 of 1

Contact History

Description.	Actioned By	Action Date
No Records To Display		

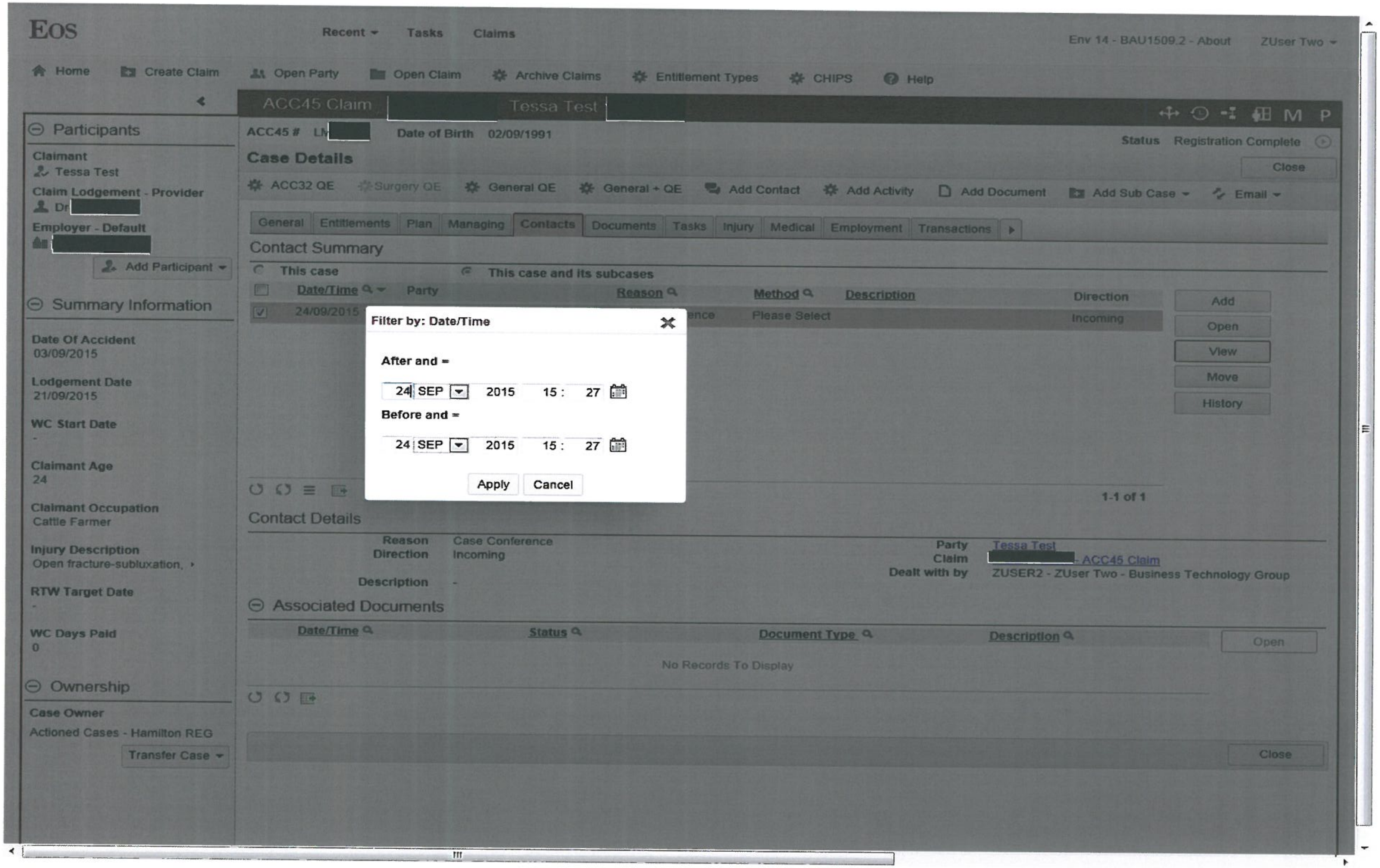
Close

Filter the list of contacts

Step 1

Open the **Contacts** tab, go to the **'Date/Time'** column and click the **magnifying glass** to **Filter.**

Filter contacts by Date Time TS[redacted]


Eos
Recent
Tasks
Claims
Env 14 - BAU1509.2 - About
ZUser Two
Home
Create Claim
Open Party
Open Claim
Archive Claims
Entitlement Types
CHIPS
Help
ACC45 Claim [redacted] Tessa Test [redacted]
Participants
Claimant
Tessa Test
Claim Lodgement - Provider
Dr [redacted]
Employer - Default
[redacted]
Add Participant
Summary Information
Date Of Accident
03/09/2015
Lodgement Date
21/09/2015
WC Start Date
-
Claimant Age
24
Claimant Occupation
Cattle Farmer
Injury Description
Open fracture-subluxation,
RTW Target Date
-
WC Days Paid
0
Ownership
Case Owner
Actioned Cases - Hamilton REG
Transfer Case
ACC45 # LM[redacted]
Date of Birth 02/09/1991
Status Registration Complete
Close
Case Details
ACC32 QE
Surgery QE
General QE
General + QE
Add Contact
Add Activity
Add Document
Add Sub Case
Email
General
Entitlements
Plan
Managing
Contacts
Documents
Tasks
Injury
Medical
Employment
Transactions
Contact Summary
This case
This case and its subcases
Date/Time
Party
Reason
Method
Description
Direction
24/09/2015
ence
Please Select
Incoming
Add
Open
View
Move
History
Filter by: Date/Time
After and =
24 SEP 2015 15 : 27
Before and =
24 SEP 2015 15 : 27
Apply
Cancel
1-1 of 1
Contact Details
Reason
Case Conference
Direction
Incoming
Description
-
Party
Tessa Test
Claim
[redacted] - ACC45 Claim
Dealt with by
ZUSER2 - ZUser Two - Business Technology Group
Associated Documents
Date/Time
Status
Document Type
Description
Open
No Records To Display
Close

Step 2

Enter the dates you want the contacts to be filtered by in the pop up window and click **Apply**.

Sort the list of contacts

Step 1

Click the **Sort** arrow (next to the filter icon).

Depending on the column format the contact list can be sorted in

- ascending (A–Z)
- descending (Z–A)
- numeric/chronological order, The **Sort** icon shows whether the order is currently in ascending (pointing up) or descending order (pointing down).

Step 2

To return the sorts and filters back to their original state click the **Reset** button (this is the anti-clockwise circle arrow at the bottom left of the section).

Open a claim from a contact record on a party

Step 1

Go to **Party Record,** enter the party name and click **Search.**

Step 2

Go to the **Contacts** tab and select the relevant contact. Click **Open** to display the **Edit Contact** screen.

Step 3

Click the claim number (hyperlinked) in the **Contact Details** to open the claim in a new screen.

Open a Claim from a Contact Record on a Party TS[redacted]

Eos

Recent ▾ Tasks Claims

Env 14 - BAU1509 2 - About ZUser Two ▾

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

Participants

Claimant
Tessa Test

Claim Lodgement - Provider
Dr [redacted]

Employer - Default
[redacted]

Add Participant ▾

Summary Information

Date Of Accident
03/09/2015

Lodgement Date
21/09/2015

WC Start Date
-

Claimant Age
24

Claimant Occupation
Cattle Farmer

Injury Description
Open fracture-subluxation,

RTW Target Date
-

WC Days Paid
0

Ownership

Case Owner
Actioned Cases - Hamilton REG

Transfer Case ▾

ACC45 Claim [redacted] Tessa Test [redacted]

ACC45 # LM[redacted] **Date of Birth** 02/09/1991 **Status** Registration Complete

Case Details

Close

ACC32 QE | Surgery QE | General QE | General + QE | Add Contact | Add Activity | Add Document | Add Sub Case ▾ | Email ▾

General | Entitlements | Plan | Managing | Contacts | Documents | Tasks | Injury | Medical | Employment | Transactions

Cover Details

Edit History

Cover Status Accept

Cover Status Reason Criteria for Cover are Met
Cover Status Change Reason -

Reassessment and Accredited Employer Details

Edit

Under Reassessment ○ Yes ◉ No
Accredited Employer Managed Dates

Claim Returned Reason Not Selected

Claim Type

Edit History

- ☐ Fatal
- ☐ Sensitive
- ☐ Work-related Mental Injury
- ☐ Hearing Loss
- ☐ Gradual Process
- ☐ Treatment Injury
- ☐ Dental

Other Indicators

Edit

- ☐ Serious Injury
- ☐ Vocational Independence
- ☐ Externally Managed
- ☐ Long Term Service Claim
- ☐ Triage
- ☐ Traumatic Brain Injury

Management Details

Edit History

Case Owner Actioned Cases - Hamilton REG
Case Owner Job Title -
Management Site Hamilton Registration Centre

To User **To Department**

Participants

Name	Role Name	Start Date	End Date	Description
Tessa Test	Claimant	21/09/2015	-	
Dr [redacted]	Claim Lodgement - Provider	21/09/2015	-	
	Employer - Default	21/09/2015	-	

View Party | Maintain Roles | View | History

1-3 of 3

Case Details

Edit History

Number [redacted]
Lodgement Date 21/09/2015

Accident Date & Time 03/09/2015 00:00

Claim Segment Assigned To Not Selected
Triage Action Not Selected
Fund Code Employers / Other Insurer
Fund Code Override Indicator ☐

Complexity Decision Reason Not Selected
Segment Assignment Rationale -
Fund Code Change Reason -

Close

Tips

- Contacts can be used to record phone calls, letters, etc. Contacts may be associated with a party because the communication was *with* a party or because it *concerned* a party.
- Contacts can be registered over the course of a client interaction. While on the phone to the client, every detail around the communication can be registered.
- Contacts are not used for communication with an internal party; instead, assign a task to the relevant party that he or she can update.
- In the 'Contact Summary' list, the paperclip icon in the first column indicates an associated document. The 'Associated Documents' section displays these documents.
- When a contact is opened from the 'Contact Summary' list, the screen 'refreshes' and returns to the top of the list; however, the selected contact stays highlighted in the list and is displayed in the Contact Details section of the screen.

Add a contact at rehabilitation action level

*All contacts that relate to a Rehabilitation Action must be added at the **Rehabilitation Action Level** of the claim. This groups all contacts relating to the Rehabilitation Action together, making contacts easier to find.*

How to:

- Add a contact at rehabilitation action level
    - Quick steps
- Tips

Add a contact at rehabilitation action level

Quick steps

1. Open claim. Go to the **Plan** tab then the **General** sub-tab
2. Select rehabilitation action from the 'Rehabilitation Actions' section. Click **Edit**
3. Go to **Contacts** tab

4. Click **Add.** Complete fields
5. Click **OK**
6. Click **Close**

Step 1

Open the claim and go to the **Plan** tab then the **General** sub-tab

Step 2

Go to the 'Rehabilitation Actions' section and select a rehabilitation action. Click **Edit** to display the Rehabilitation Action screen.

Add Contact in Rehab Action TS[redacted]

Step 3

Go to the **Contacts** tab

Step 4

Click **Add** to display the **Add Contact** screen. Complete the required fields.

Add Contact Details in Rehab Action TS[redacted]

Eos

Recent ▾ Tasks Claims

Env 14 - BAU1509.2 - About ZUser Two ▾

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

ACC45 Claim

- Cover Assessment
- Home and Living
- Treatment
- Vocational and Educational
- Vocational Rehabilitation and Independence
- Weekly Compensation

i Cover Assessment CA [redacted] Miss Matilda Mouse [redacted]

M P

Date of Birth 10/09/1990

Status Cover Assessment

Add Contact

OK Cancel

Contact Details

Reason: Please Select

Direction: Incoming

Description:

Party: Miss Matilda Mouse

Claim: CA [redacted] - Cover Assessment

Method of Contact: Please Select

Creation Details

User: ZUser Two - ZUSER2

Date/Time: 25 SEP 2015 13 : 00

List of Documents

Date/Time	Status	Document Type	Description
No Records To Display			

Open

OK Cancel

Step 5

Click **OK** to add the contact(s) to the rehabilitation action.

Step 6

Click **Close** to return to the **General** sub-tab of the **Plan** tab in the claim.

Tips

- Contacts added at Rehabilitation Action level roll-up to claim level.
- In the **Add Contact** screen, the contact details you add will be the first party in the 'To' list for a contact created during the generation of a document. If the desired party doesn't exist, a party record will need to be created before the contact can be recorded.
- When a contact is opened from the 'Contact Summary' list, the screen 'refreshes' and returns to the top of the list; however, the selected contact stays highlighted in the list and is displayed in the 'Contact Details' section of the screen.
- To collapse a section, click the '-' button.
- To expand a section, click the '+' button.
- If a section is collapsed on one claim, the same section will show as collapsed on all other claims opened. The same rule applies for expanded sections.
- If contacts have not been added, the screen will only display the **Contact Summary** section

Add a contact

Use these instructions to record details of a communication with an external party as a Contact.

Contacts are used to record details of communications with external parties. It's important to record contacts so that other staff members are able to see all of the communications relating to a claim or party.

You can also record details about internal discussions or meetings related to a claim or a party, using the contact reason 'Contact with Internal Party'.

When adding a contact to a claim, the client is the default party for all new contacts

How to:

- Add a client contact
- Add a non-client contact using the search function
- Add a non-client contact using the Participant function
    - Quick steps

Add a client contact

Step 1

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

Add Contact through Party Record TS[redacted]

Eos

Recent ▾ Tasks Claims

Env 14 - BAU1509.2 - About ZUser Two ▾

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

Tessa Test

Customer Number [redacted]

Add Contact

OK Cancel

Contact Details

Reason	Please Select	**Party**	Tessa Test
Direction	Incoming	**Claim**	-
Description		**Method of Contact**	Please Select

Creation Details

User	ZUser Two - ZUSER2	**Date/Time**	25 SEP 2015 10 : 51

List of Documents

Date/Time	Status	Document Type	Description
No Records To Display			

Open

OK Cancel

Add Contact through Claim TS[redacted]

Eos

Recent ▾ | Tasks | Claims

Env 14 - BAU1509.2 - About | Sample User ▾

Home | Create Claim | Open Party | Open Claim | Entitlement Types | CHIPS | Help

A | ACC45 Claim [redacted] Buzz Lightyear [redacted]

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

Status Registration Complete

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, kne ▸

RTW Target Date
-

WC Days Paid
0

Ownership

Case Owner
Sample User [redacted]

Transfer Case ▾

Add Contact

OK | Cancel

Contact Details

Reason Please Select

Direction Incoming

Description

Party Buzz Lightyear

Claim [redacted] - ACC45 Claim

Method of Contact Please Select

Creation Details

User Sample User - [redacted]

Date/Time 21 SEP 2015 09 : 17

List of Documents

Date/Time	Status	Document Type	Description

Open

No Records To Display

OK | Cancel

Eos

Recent ▾ Tasks Claims

Env 14 - BAU1509.0.3 - About Sample User ▾

Home | Create Claim | Open Party | Open Claim | Entitlement Types | CHIPS | Help

I A V ACC45 Claim [redacted] Buzz Lightyear [redacted] M P

ACC45 Claim

Ancillary Services

Hearing Loss

Social Rehabilitation

Weekly Compensation

Participants

Claimant
Buzz Lightyear

Claim Lodgement - Provider
Dr [redacted]

Provider - GP
Dr [redacted]

Provider - Social Rehab
Access Homehealth Limited

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, kne ▸

RTW Target Date
23/09/2015

WC Days Paid
0

Ownership

Case Owner
Sample User [redacted]

Transfer Case ▾

ACC45 # AC[redacted] Date of Birth 14/07/1980 Status Registration Complete

Case Details

Close

ACC32 QE | Surgery QE | General QE | General + QE | Add Contact | Add Activity | Add Document | Add Sub Case ▾ | Email ▾

General | Entitlements | Plan | Managing | Contacts | Documents | Tasks | Injury | Medical | Employment | Transactions ▸

Documents for Claim | Document Groups

Documents

☑ Display Sub-Case Documents ☐ Display Removed Documents

Date/Time	Creator	Status	Document Type	Description
29/09/2015 14:59	Sample User	Complete	Initial Client Contact Script Transcript	
29/09/2015 12:52	Sample User	Not Selected	Internal Referral/Panel	
29/09/2015 12:42	Sample User	Cancelled	PS04 Psychological services - psychiatric referral letter to provider	
29/09/2015 12:28	Sample User	Incomplete	PS04 Psychological services - psychiatric referral letter to provider	
29/09/2015 12:18	Sample User	Incomplete	EVC02 Elderly victim of crime assessment outcome decision letter	
29/09/2015 12:03	Sample User	Not Selected	Internal Referral/Panel	
29/09/2015 10:54	Sample User	Complete	HCS01 - HCS Approve (Contracted only) - Client [redacted]	
29/09/2015 10:44	Sample User	Complete	ACC5972 Referral for Home & Community Support Services - Vendor	HCSS Approval Letters
29/09/2015 07:58	Sample User	Incomplete	IB - HCSS Service Plan/Progesss Report	
29/09/2015 07:49	Sample User	Not Selected	ACC6193 Referral for Extension of HCSS Care	

1-31 of 31

Add | Open | Properties | Print Doc(s) | Move | Email | History

Scripts

Date/Time	Creator	Updated	Last Updated By	Status	Document Type

No Records To Display

View

Close

Step 4

Open the **Contacts** tab and select the contact related to the document you have cancelled (which will be displayed in the **Associated Documents** section.

Documents - **Associated Documents Cancelled TS**[redacted]

Eos Recent ▾ Tasks Claims Env 14 - BAU1509.0.3 - About Sample User ▾

Home Create Claim Open Party Open Claim Entitlement Types CHIPS Help

I A V ACC45 Claim [redacted] Buzz Lightyear [redacted]

ACC45 Claim

- Ancillary Services
- Hearing Loss
- Social Rehabilitation
- Weekly Compensation

Participants

Claimant
Buzz Lightyear

Claim Lodgement - Provider
Dr [redacted]

Provider - GP
Dr [redacted]

Provider - Social Rehab
Access Homehealth Limited

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, kne ▸

RTW Target Date
23/09/2015

WC Days Paid
0

Ownership

Case Owner
Sample User ([redacted]

Transfer Case ▾

ACC45 # AC[redacted] Date of Birth 14/07/1980 Status Registration Complete

Case Details

Close

ACC32 QE Surgery QE General QE General + QE Add Contact Add Activity Add Document Add Sub Case ▾ Email ▾

General | Entitlements | Plan | Managing | Contacts | Documents | Tasks | Injury | Medical | Employment | Transactions ▸

Contact Summary

This case This case and its subcases

Date/Time	Party	Reason	Method	Description	Direction
29/09/2015 14:59	Buzz Lightyear	Contact With Claimant	Phone	Initial Client Contact Script Transcript - comple ▸	Outgoing
29/09/2015 12:42	Buzz Lightyear	Please Select	Please Select		Incoming
29/09/2015 12:28	Buzz Lightyear	Please Select	Please Select		Incoming
29/09/2015 12:18	Buzz Lightyear	Referrals/Approvals	Letter	wgtearyhga4ey4y	Outgoing
29/09/2015 10:54	Buzz Lightyear	Referrals/Approvals	Original	9331051	Outgoing
29/09/2015 10:44	Access Homehealth Limited	Referrals/Approvals	Original	HCSS Approval Letters	Outgoing
29/09/2015 07:58	Buzz Lightyear	Please Select	Please Select	test upload doc	Incoming
29/09/2015 07:49	Buzz Lightyear	Please Select	Please Select		Incoming

Add Open View Move History

1-33 of 33

Contact Details

Reason Please Select
Direction Incoming
Description -

Party Buzz Lightyear
Claim [redacted] - ACC45 Claim
Dealt with by [redacted] - Sample User - Business Technology Group

Associated Documents

Date/Time	Status	Document Type	Description
29/09/2015 12:42	Cancelled	PS04 Psychological services - psychiatric referral letter to provider	

Open

1-1 of 1

Close

Step 5

Click the **Open** button to display the 'Edit/View Contact' screen.

Note: Any relevant details such as the document has been cancelled or not sent in the **Description** field.

Step 6

Click **OK** to return to the **Contacts** tab where the Description is now updated with **Document has been cancelled**.

Remove a document

This activity is restricted by delegation.

Don't remove the document first. Ensure you remove the contact associated with the document from the party level, which automatically removes the contact and document at party level and claim level.

Quick steps

1. Open party record and go to the **Contacts tab**
2. Select the contact related to the document
3. Click **Remove**
4. Click **Yes**

5. For **serious injury, purchase order documents** and **documents linked to tasks** also do the following to remove the document from the related list view:
6. Go to the **serious injury planning** episode, **purchase order** episode, **or task document** list view and select the relevant document
7. Click the **Properties** button
8. Click **Remove**
9. **Click Yes**

Step 1

Open the party record and go to the **Contacts tab** and select the contact related to the document.

Party Contacts Tab TS[redacted]

Eos Recent ▾ Tasks Claims Env 14 - BAU1509.0.3 - About ZUser Two ▾

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

A Buzz Lightyear

This client has selected an alternate contact method/person for their Sensitive Claim Open

Customer Number [redacted]

Party Details

Close

Edit Party Delete Party Merge Party Add Contact 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		[redacted] - ACC45 Claim
06/10/2015 15:36	Incoming	Contact With Employer	Original		[redacted] - ACC45 Claim
06/10/2015 15:18	Incoming	Please Select	Please Select		MIS-INT [redacted] - ISSC Inte ▸
05/10/2015 15:56	Outgoing	Referrals/Approvals	Original	9332046	TMT [redacted] Treatment
02/10/2015 15:16	Outgoing	Case Conference	Phone	ISSC Case Conference completed w ▸	MIS-INT [redacted] - ISSC Inte ▸
02/10/2015 13:34	Outgoing	ISSC Initial Contact	Phone	Initial Client Contact completed	[redacted] - ACC45

Add Open Remove Move History

1-60 of 60

Contact Details

Reason Please Select
Direction Incoming
Description -

Party Buzz Lightyear
Claim [redacted] - ACC45 Claim
Dealt with by [redacted] - Sample User - Business Technology Group

Associated Documents

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

Open

1-1 of 1

Close

Step 2

Click **Remove** then click **Yes** in the resulting pop up window to confirm and remove the contact.

Both the contact and associated document are now removed from the document list views in the system.

Remove a document linked to a task, a serious injury or purchase order document

For **serious injury, purchase order documents** and **documents linked to tasks** follow these extra steps to remove the document from the related list view.

Step 1

Complete the steps under Remove a document.

Step 2

Go to the **serious injury planning** episode, **purchase order** episode, **or task document** list view and select the relevant document.

Step 3

Click the **Properties** button to display the 'Document Properties' screen.

Document Properties TS[redacted]

Eos

Recent ▾ Tasks Claims

Env 14 - BAU1509 0 3 - About Sample User ▾

Home | Create Claim | Open Party | Open Claim | Entitlement Types | CHIPS | Help

i A V ACC45 Claim [redacted] Buzz Lightyear [redacted] M P

ACC45 Claim

- Ancillary Services
- Hearing Loss
- Social Rehabilitation
- Weekly Compensation

Participants

Claimant
Buzz Lightyear

Claim Lodgement - Provider
Dr [redacted]

Provider - GP
Dr [redacted]

Provider - Social Rehab
Access Homehealth Limited

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, kne ▸

RTW Target Date
23/09/2015

WC Days Paid
0

Ownership

Case Owner
Sample User [redacted]

Transfer Case ▾

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

Status Registration Complete

Document Properties

OK | Cancel

Security Level Not Selected
Document Type FSREB06 Supporting your independence - transport options
Party Buzz Lightyear
Rehabilitation Action: AS [redacted] - Ancillary Services
Linked Document: -
Document Status Incomplete
Description

Remove | Delete

This Document is a Member of These Document Groups

Name	Linked to	Description
No Records To Display		

Locked By: -
Creator Sample User
Last Updated By Sample User
Signature Date
Content ID ENV14-EOS-0000000000000003489
Type Document

Creation Date 28/09/2015 15:46
Last Updated Date 28/09/2015 15:46
Signed By Please Select

Document Status History

Description	Actioned By	Action Date ▾
Incomplete	[redacted]	28/09/2015 15:46
Set Privacy Tag to Unknown		28/09/2015 15:46

1-2 of 2

OK | Cancel

Step 4

Click **Remove** then click **Yes** in the resulting pop up window to confirm and remove the document.

The document status is now updated to **removed**, after which the document will no longer display on the default document list views in these areas.

Remove a document without an associated contact

Quick steps

1. Open claim and go to the **Documents** tab
2. Select the document and click **Properties**
3. Click **Remove**
4. Click **Yes**

Only the business unit and team managers have system rights to remove a document.

Step 1

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

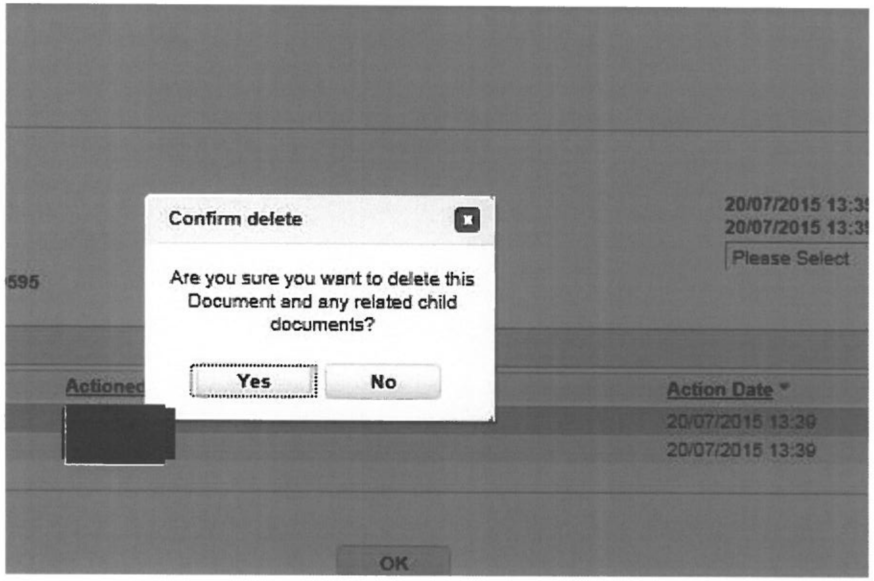
Step 2

Select the document and click **Properties** to display the 'Document Properties' screen.

Step 3

Click **Remove** then click **Yes** in the resulting pop up window to confirm the removal of the document.

Documents - Confirm Delete Message TS[redacted]



Tips

- Documents can be deleted during the document generation process if you generate the wrong document.
- Documents can be cancelled if you generated the document in error and the status is 'Incomplete'
- Documents with a status of 'Complete' can only be removed by the business unit or team manager.

Step 2

Enter the contact details.

Step 3

Select the **reason**, **method of contact** and **direction** from the drop-down lists.

- The '**Claimant Care Notes'** reason should be selected only if there is a valid reason for not disclosing a contact as part of the print Claim File report, for example when managing risky clients.
- See Contact reasons and recommended use for more information.

Step 4

Enter the date or click on the calendar icon to select a date and click **OK.**

Add a non-client contact using the search function

Step 1

Open the claim and go to the **Contacts** tab. Click **Add.**

Step 2

Click the **magnifying glass** (search icon) next to the **Party** field to associate the other party with the contact.

Step 3

Click the appropriate tab for the party type you are contacting and enter search criteria. Click **Search.**

Add Non-Client Contact TS[redacted]

Eos

Recent ▾ Tasks Claims

Env 14 - BAU1509.2 - About ZUser Two ▾

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

ACC45 Claim [redacted] Tessa Test [redacted]

M P

Participants

Claimant
Tessa Test

Claim Lodgement - Provider
Dr [redacted]

Employer - Default
[redacted]

Add Participant ▾

Summary Information

Date Of Accident
03/09/2015

Lodgement Date
21/09/2015

WC Start Date
-

Claimant Age
24

Claimant Occupation
Cattle Farmer

Injury Description
Open fracture-subluxation, ▸

RTW Target Date
-

WC Days Paid
0

Ownership

Case Owner
Actioned Cases - Hamilton REG

Transfer Case ▾

ACC45 # LM[redacted] **Date of Birth** 02/09/1991 **Status** Registration Complete

Add Contact

OK Cancel

Contact Details

Reason Please Select
Direction Incoming
Description

Party Miss Matilda Mouse
Claim [redacted] - ACC45 Claim
Method of Contact Please Select

Creation Details

User ZUser Two - ZUSER2
Date/Time 25 SEP 2015 11 : 08

List of Documents

Date/Time	Status	Document Type	Description

No Records To Display

Open

OK Cancel

Add a non-client contact using the Participants function

Quick steps

1. Open claim. Go to the **General** tab
2. Select the party from **Participants** (Note claim number)
3. Click **View Party**
4. Go to **Contacts** tab. Click **Add**
5. Click **magnifying glass** next to **Claim**
6. Enter claim number in **Claim Number/ACC45 Number** field
7. Click **Search**. Select claim. Click **OK**
8. Complete details in **Add Contact**. Click **OK**

Step 1

Open claim and go to the **General** tab and select the appropriate party from **Participants** list view.

- Make a note of the associated claim number.

Add Non-Client Contact through Participants in Case Details TS[redacted]

Eos

Recent ▾ Tasks Claims

Env 14 - BAU1509.2 - About ZUser Two ▾

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

ACC45 Claim [redacted] Oliver Overthere [redacted]

Participants

Claimant
Oliver Overthere

Claim Lodgement - Provider
Dr [redacted]

Employer - Default
Amuri Ltd

Add Participant ▾

Summary Information

Date Of Accident
08/09/2015

Lodgement Date
21/09/2015

WC Start Date
-

Claimant Age
59

Claimant Occupation
Retail Sales Assistant ▸

Injury Description
[X]Dislocation, sprain and ▸

RTW Target Date
-

WC Days Paid
0

Ownership

Case Owner
Actioned Cases - Hamilton REG

Transfer Case ▾

ACC45 # LM[redacted] **Date of Birth** 07/08/1956 **Status** Registration Complete

Case Details

Close

ACC32 QE | Surgery QE | General QE | General + QE | Add Contact | Add Activity | Add Document | Add Sub Case ▾ | Email ▾

General | Entitlements | Plan | Managing | Contacts | Documents | Tasks | Injury | Medical | Employment | Transactions

Cover Details

Edit History

Cover Status Accept

Cover Status Reason Criteria for Cover are Met
Cover Status Change Reason -

Reassessment and Accredited Employer Details

Edit

Under Reassessment ○ Yes ● No
Accredited Employer Managed Dates

Claim Returned Reason Not Selected

Claim Type

Edit History

- ☐ Fatal
- ☐ Sensitive
- ☐ Work-related Mental Injury
- ☐ Hearing Loss
- ☐ Gradual Process
- ☑ Treatment Injury
- ☐ Dental

Other Indicators

Edit

- ☐ Serious Injury
- ☐ Vocational Independence
- ☐ Externally Managed
- ☐ Long Term Service Claim
- ☐ Triage
- ☐ Traumatic Brain Injury

Management Details

Edit History

Case Owner Actioned Cases - Hamilton REG
Case Owner Job Title -
Management Site Hamilton Registration Centre

To User
To Department

Participants

Name	Role Name	Start Date	End Date	Description
Oliver Overthere	Claimant	21/09/2015	-	
Dr [redacted]	Claim Lodgement - Provider	21/09/2015	-	
Amuri Ltd	Employer - Default	21/09/2015	-	

View Party | Maintain Roles | View | History

1-3 of 3

Case Details

Edit History

Number [redacted]
Lodgement Date 21/09/2015

Accident Date & Time 08/09/2015 00:00

Claim Segment Assigned To Not Selected
Triage Action Not Selected
Fund Code Treatment Injury
Fund Code Override Indicator ☐

Complexity Decision Reason Not Selected
Segment Assignment Rationale -
Fund Code Change Reason -

Close

Step 2

Click **View Party** to display the party record.

View Party Record TS[redacted]

EOS

Recent ▾ Tasks Claims

Env 14 - BAU1509.2 - About ZUser Two ▾

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

Oliver Overthere

Customer Number [redacted]

Party Details

Close

Edit Party Delete Party Merge Party Add Contact Add Activity Email ▾

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

Name & ID

Name Oliver Overthere
Preferred Name -
Person ID [redacted]

Misc Details

☐ **Staff**
Preferred Language -
☐ **High Profile Client**
☐ **Interpreter Required**

Contact Information

History

Preferred Contact Method Post
Email -
Preferred Contact Time Anytime

Address

Type	From	To	Address Details
Home	21/09/2015	-	[redacted] New Zealand ** Valid **

History

Method	Detail
No Records To Display	

History

Step 3

Go to the **Contacts** tab and click **Add.**

Step 4

Click the **magnifying glass** (search icon) next to the **Claim** field to display the **Case Search** screen.

Step 5

Enter the claim number in the **Claim Number/ACC45 Number** field.

Add Non-Client Contact Claim Search TS[redacted]

EOS

Recent ▾ Tasks Claims

Env 14 - BAU1509.2 - About ZUser Two ▾

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

Oliver Overthere

Customer Number [redacted]

Claim Search

OK Cancel

Claim | Person | Provider | Employer | Purchase Order / ACC32 Number | Recent

Claim Number / ACC45 Number [redacted]

Search

New Search

OK Cancel

Step 6

Click **Search** to populate the **Claim** field with the number. Select the relevant claim. Click **OK**.

Step 7

Complete the details in **Add Contact**. Click **OK.**