


Manage Documents for a Claim


† Modified on 09/09/2024 10:38 am EDT

Add a document to a claim.

1. Select **Claim > Claim**.
2. Use the **Search** field to search for your claim.

 Place a check in the **“Show exact matches only”** box to search for exact matches or **“Show unpaid claims only”** to show claims that may need follow-up.


3. Open the claim.
4. Click the **Documents** tab from the side panel.
5. Select whether the document is **Patient Document** or **Claim Document**.
6. Click the **Add** button and choose how you want to associate a document:
 1. Select **Associate Existing** to choose a document that’s already been uploaded.
 1. Drill down into the appropriate folder.
 2. Click the document you want to associate.
 3. Click **Save**.
 2. Select **Upload New** to open a new window.
 1. Click the **Add Files** button.
 2. Select the file from your local drive.
 3. Add any applicable note.
 4. Choose the **Folder Location** to add the file.
 5. Click **Select**.
 6. Click **Upload Files**.


 A red number indicator is displayed in the "Documents" side panel tab, indicating the number of documents associated with the claim.

7. Click **Save**.

Delete claim documents.

1. Select **Claim** > **Claim**.
2. Use the **Search** field to search for your claim.

 Place a check in the “**Show exact matches only**” box to search for exact matches or “**Show unpaid claims only**” to show claims that may need follow-up.

3. Open the claim.
 4. Click on the **Documents** tab from the side panel.
 5. Click the **Delete**  icon next to the claim document file you want to delete.
 6. Click **Save**.
-