



Document Locker User Guide

All Company® trademarks and logos are owned by Company, Inc. All other brand or product names are trademarks or registered marks of their respective owners. Because we are continuously improving our products and services, Company, Inc. reserves the right to change specifications without prior notice. Company, Inc. is an equal opportunity employer.

© 20XX Company, Inc. All rights reserved.

Contents

Overview of the Document Locker User Guide	4
Objective	4
Intended audience	4
Related documentation	4
About Document Locker	5
About documents and reporting applications	5
Document Locker security and what you can see in Document Locker	5
Getting started with Document Locker	6
Open Document Locker	6
Document Locker badges and flags	6
Document Locker home page	8
My Flagged Items	8
My Report Links	8
Search	8
My Documents	8
Feedback	8
Document Locker how-to procedures	9
Browse, sort, preview, and download documents	9
Search for documents	10
Flag and unflag folders and documents	11
Use reporting applications	12
Access Document Locker documentation	12

Overview of the Document Locker User Guide

Objective

The objective of this guide is to provide providers who access any provider dashboard with the information they need to use Document Locker to access to reports and reporting applications.

Intended audience

The audience for this guide is providers who access any provider dashboard on the platform and have been given access to view certain reports and documents.

Related documentation

The **Documentation & Reference** folder in Document Locker contains documentation on Document Locker including this guide, the Document Locker FAQ, and documentation on using specific Document Locker reports and reporting applications. For more information on Document Locker documentation, see **Access Document Locker documentation** on page 12.

About Document Locker

About documents and reporting applications

Document Locker is an electronic reporting hub. From Document Locker, you can access any report document or reporting application that has been made available to you. With reporting applications, you can create and modify reports.

Types of reports and reporting applications

Document Locker contains static report documents and reporting applications.

- Static report documents appear in the **My Documents** section on the Document Locker home page. You navigate through a folder structure to access these reports. You can also search for reports based on criteria such as creation date, TIN number, or claim number.
- Reporting application links appear in the **My Report Links** section on the Document Locker home page. These links launch reporting applications you have access to.

How long documents remain in Document Locker

Documents stay in Document Locker for a period of time as determined by the document creator. You can see the expiration date of documents in both the **Search** results and **My Documents** sections of Document Locker.

Document Locker security and what you can see in Document Locker

Document Locker uses your ID to identify you as a member of your organization and to determine your role. You will only see the reports and correspondence that someone at your organization with your role is authorized to see.

Getting started with Document Locker

Document Locker is available from any provider dashboard or from an application that includes the top navigation bar.


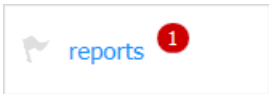
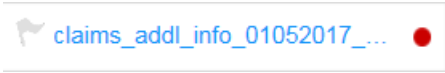
Open Document Locker



Follow the steps below to open Document Locker.

Step	Action
1	Navigate to your dashboard or open an application that includes the top navigation bar.
2	Click the padlocked document icon in the navigation bar at the top of the page. The Document Locker home page opens in a separate browser tab titled Document Vault .

Document Locker badges and flags

Document Locker uses badges and flags to help you quickly navigate your folders and documents.

Badge or flag	Meaning
	Clicking the padlocked document icon opens Document Locker from the top navigation bar.
	A document folder with a red dot with a number in it means there are that many new documents available in that folder. After you look at a new document in that folder, the number counts down and the red dot finally disappears when there are no new documents in the folder.
	A document with a red dot indicates that it's a document that you haven't looked at or downloaded yet. The red dot disappears when you look at the document.

Badge or flag	Meaning
	<p>A gray flag is one that can be turned on for the folder or document. Flagging an item changes the flag from gray to red and adds a link to the item in the My Flagged Items section of the Document Locker home page. For more information, see Flag and unflag folders and documents on page 11.</p>
	<p>A red flag on a folder or document indicates that the item is flagged, and a link exists in the My Flagged Items section of the Document Locker home page so you can quickly access the item. To remove the flag, click the red flag or the x on the link in My Flagged Items. For more information, see Flag and unflag folders and documents on page 11.</p>

Document Locker home page

The Document Locker home page contains several main sections.

My Flagged Items

You can flag documents or folders for easy access. When you flag a folder or document, a link to it appears in this section. Clicking the link will open that document or folder in the **My Documents** section. For more information on flagging an item, see **Flag and unflag folders and documents** on page 11.

My Report Links

Report links provide direct access to reporting applications from within Document Locker. When you have access to a reporting application, you will see it here and can click it to open the application. For more information on reporting applications, see **Use reporting applications** on page 12.

Search

You can search Document Locker based on criteria supplied by the reporting application that created the document. For more information on searching, see **Search for documents** on page 10.

My Documents

This section displays any documents that have been made available to you based on your access to TINs. The folder hierarchy allows you to navigate to folders and documents. For more information on browsing, sorting, viewing, and downloading documents, see **Browse, sort, preview, and download documents** on page 9.

Feedback



The Document Locker home page contains a **Feedback** button. Clicking **Feedback** launches an online survey to provide feedback about Document Locker.

Document Locker how-to procedures

Document Locker is intuitive and easy to use, but the procedures in this section give you step-by-step instructions.

Browse, sort, preview, and download documents



The **My Documents** area of the Document Locker home page contains folders of documents. You will only see documents that someone with your role at your organization is permitted to view. Follow the steps below to browse, sort, preview, and download documents.

Step	Action
1	Click the folder you want to browse from the first column under My Documents . You may see additional folders in the next column.
2	Click the additional folder you want to browse, if any. As you click through the folders, Document Locker displays the folder path beneath the My Documents heading so you can easily navigate back. After clicking the folder in the last column, you will see the documents available in that folder. The red badges on folders and documents help you identify new (not previously viewed or downloaded) folders and documents. By default, new documents appear at the top of the list.
3	Do one of the following in the list of documents: <ul style="list-style-type: none">Click the arrows in the column header to sort the documents by the values in other columns, such as TIN or Claim #.Click the document link or the preview icon  to preview the document. The document will open in a separate tab in read-only mode. Note: Place your mouse over the document link to display the complete document name.Click the download icon  to download the document. You will have an opportunity to open or save the document. After previewing or downloading a document, Document Locker removes the red badge from the document and reduces the number of new documents shown.
4	To navigate to a different folder, click it.

Search for documents

The **Search** area of the Document Locker home page allows you to search the folders and documents available to you in Document Locker. Follow the steps below to search for documents.

Step	Action
1	<p>Use the Search drop-down list to select the field you want to search. The fields you can search are defined by the reporting applications. For example, if you want to search for a payment statement, you can search by document name, claim number, creation date, member ID, or TIN.</p>
2	<p>In the Search field, enter a whole or partial search term. For example, if you are searching by claim number, enter some or all of the digits in the claim number.</p> <p>Click the X in the Search field to clear text you have entered so you can type in different search criteria.</p> <p>Note: When you select Creation Date in the Search drop-down list, you must enter the date in the Search field in MM/DD/YY or MM/DD/YYYY format.</p>
3	<p>Click Search. Document Locker displays folders and documents that met the search criteria. The number of documents found appears above the search results.</p> <p>The red badges on folders and documents help you identify new (not previously viewed or downloaded) folders and documents. New documents appear at the top of the list.</p>

Step	Action
4	<p>Do one of the following in the search results:</p> <ul style="list-style-type: none"> • Click the arrows in the column header to sort the documents. • Click the document link or the preview icon  to preview the document. The document will open in a separate tab in read-only mode. • Click the download icon  to download the document. You will have an opportunity to open or save the document. <p>After previewing or downloading a document, Document Locker removes the red badge from the document and reduces the number of new documents shown.</p>
5	<p>To close the search results, do one of the following:</p> <ul style="list-style-type: none"> • Refresh your browser. The search results will disappear. • Enter another search term and conduct another search. The new search results will replace the previous search results. If no search results are found, the previous search results will disappear.

Flag and unflag folders and documents

Flags allow you to mark a document or folder so you can find it more quickly. When you have flagged a folder or document, it will appear in the **My Flagged Items** area at the top of the Document Locker home page. Follow the steps below to use flags in Document Locker.

Step	Action
1	<p>Click the gray flag icon beside a folder or document in My Documents or in the search results. The gray flag turns red and a flag link for the folder or document appears in the My Flagged Items area of the Document Locker home page. You can flag up to 10 folders or documents. Document Locker keeps your flags when you log out.</p>
2	<p>To return to a flagged item, click the flag link in My Flagged Items.</p>
3	<p>To remove the flag on a document or folder, do one of the following:</p> <ul style="list-style-type: none"> • Click the red flag next to the folder or document name. The gray flag reappears beside the folder or document and the flag link in My Flagged Items is removed. • Click the X on a flag link in My Flagged Items. The flag link disappears and the gray flag reappears beside the folder or document.

Use reporting applications


The **My Report Links** section of the Document Locker home page contains an alphabetical list of reporting applications that you have access to. Follow the steps below to use reporting applications in Document Locker.

Note: My Report Links contains only reporting applications that have been provisioned for you. You must be provisioned for at least one reporting application in order to see the **My Report Links** section.

Step	Action
1	Click a report link in My Report Links . The reporting application opens in a new browser tab.

Access Document Locker documentation

Document Locker documentation provides instructions and information for using Document Locker and may also include documentation about the reports you have access to. All Document Locker users have access to Document Locker documentation. Follow the steps below to access Document Locker documentation.

Step	Action
1	In the My Documents area of the Document Locker home page, click the Documentation & Reference folder. You will see links to the available documents in the Document Name column.
2	Click a document link to open the document or click the download icon  to save it to your computer.