

# “Solutions” Image Services

## Changing Fiscal Year Property in Claims Processing

### Contents

- Introduction** .....1
- Summary Process\***.....1
- Detail Process**.....1
  - Single Document.....1
  - Multiple Documents at Once.....4

### Introduction

The purpose of this document is to illustrate the process for changing the Fiscal Year property on a Claims Processing Document profile.

### Summary Process\*

Open Document Locator

Locate the appropriate document

- Right click, select Update Profile
- Enter in the correct Fiscal Year
- Check ‘Only Update Property Values that Changed’
- Close document to check it in
- Right click, select Workflow, Workflow Request
- Select the workflow of ‘Move and Rename CL Workflow’

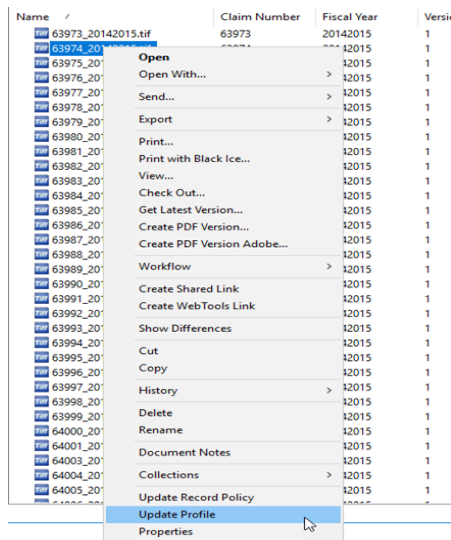
Verify document is named correctly, in the correct folder and has the correct year when the workflow is complete.

\*This process can be done on multiple documents at one time if the fiscal year is the same.

### Detail Process

#### Single Document

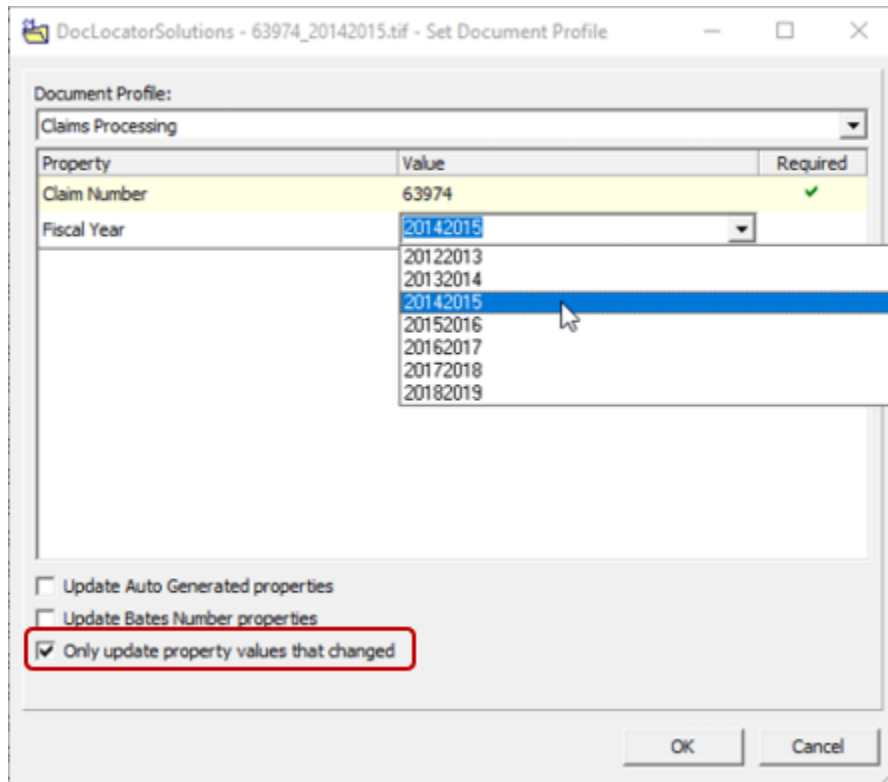
Locate your document, right click and select “Update Profile.”



## “Solutions” Image Services

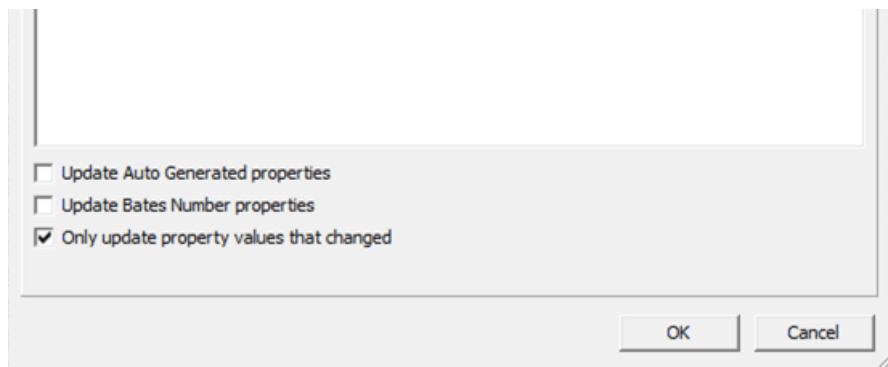
### Changing Fiscal Year Property in Claims Processing

In this window, select the correct Fiscal Year from the drop down. Ensure the “Only update property values that changed” box is checked.



**Note:** If you do not see the correct Fiscal Year, contact Solutions Document Locator team at [dl@gmdsolutions.com](mailto:dl@gmdsolutions.com) and request that we add the new year.

Once you have selected the correct Fiscal Year, select Ok to continue.



Once the Fiscal Year is changed, request a Move and Rename CL Workflow.

## “Solutions” Image Services

### Changing Fiscal Year Property in Claims Processing

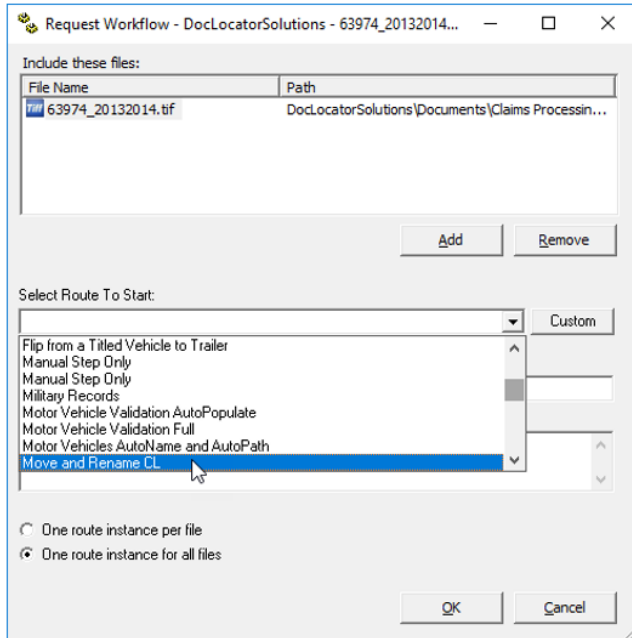
To do this, right click that document and select “Workflow Request.”

Name	Claim Number	Fiscal Year	Version	Checked Out By	Modified
TIF 63973_20142015.tif	63973	20142015	1		2015-04-1
TIF 63974_20132014.tif	63974	20142015	1		2015-04-1
TIF 63975_20142015.tif			1		2015-04-1
TIF 63976_20142015.tif			1		2015-04-1
TIF 63977_20142015.tif			1		2015-04-1
TIF 63978_20142015.tif			1		2015-04-1
TIF 63979_20142015.tif			1		2015-04-1
TIF 63980_20142015.tif			1		2015-04-1
TIF 63981_20142015.tif			1		2015-04-1
TIF 63982_20142015.tif			1		2015-04-1
TIF 63983_20142015.tif			1		2015-04-1
TIF 63984_20142015.tif			1		2015-04-1
TIF 63985_20142015.tif			1		2015-04-1
TIF 63986_20142015.tif			1		2015-04-1
TIF 63987_20142015.tif			1		2015-04-1
TIF 63988_20142015.tif			1		2015-04-1
TIF 63989_20142015.tif			1		2015-04-1
TIF 63990_20142015.tif			1		2015-04-1
TIF 63991_20142015.tif			1		2015-04-1
TIF 63992_20142015.tif			1		2015-04-1
TIF 63993_20142015.tif			1		2015-04-1
TIF 63994_20142015.tif			1		2015-04-1
TIF 63995_20142015.tif			1		2015-04-1
TIF 63996_20142015.tif			1		2015-04-1
TIF 63997_20142015.tif			1		2015-04-1
TIF 63998_20142015.tif			1		2015-04-1
TIF 63999_20142015.tif			1		2015-04-1
TIF 64000_20142015.tif			1		2015-04-1
TIF 64001_20142015.tif			1		2015-04-1
TIF 64003_20142015.tif			1		2015-04-1
TIF 64004_20142015.tif			1		2015-04-1
TIF 64005_20142015.tif			1		2015-04-1

Select the correct Workflow from the drop-down menu.  
 You may have a different workflow name such as “Move and Rename Claims Processing.”  
 If you do not see either of these workflows, contact Solutions.

## “Solutions” Image Services

### Changing Fiscal Year Property in Claims Processing

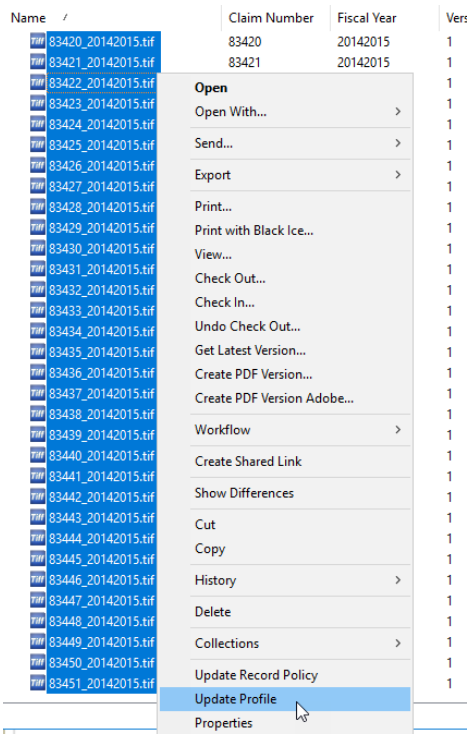


After selecting the Workflow, select Ok to continue.

Once the Workflow is complete, verify that the document is properly named and located in the correct folder.

### Multiple Documents at Once

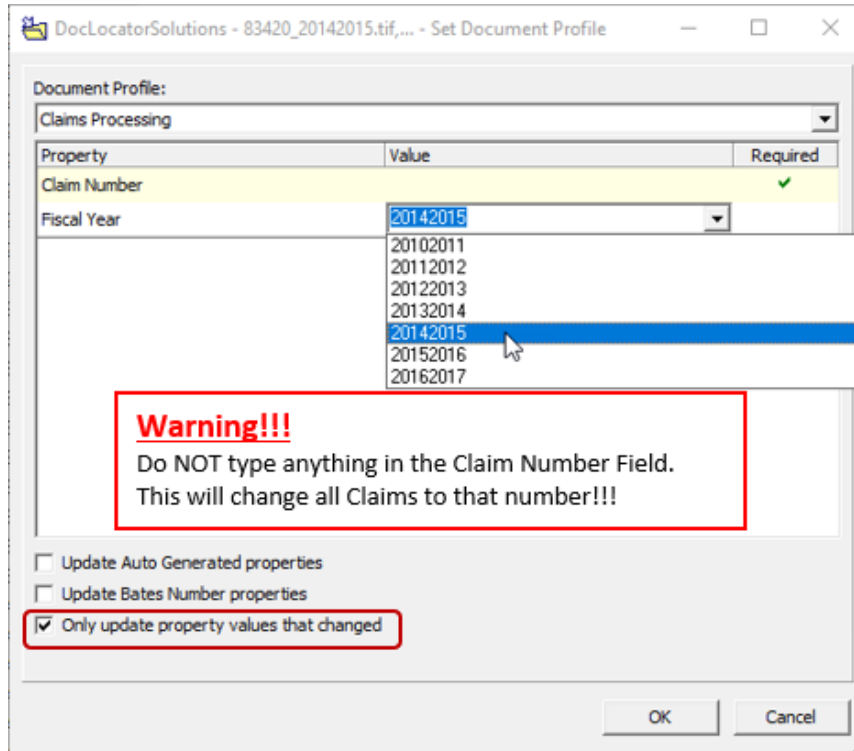
Locate and highlight multiple documents to change to the same Fiscal Year. Right click and select “Update Profile.”



## “Solutions” Image Services

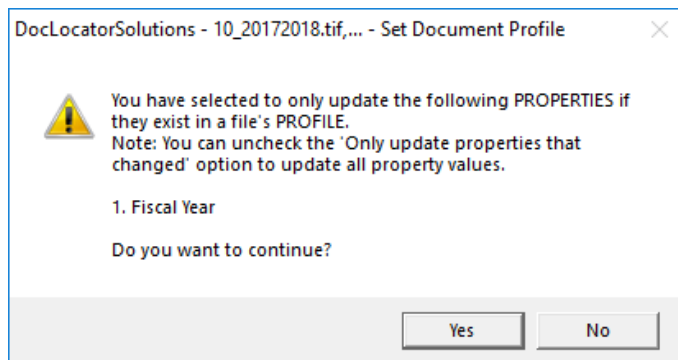
### Changing Fiscal Year Property in Claims Processing

Select the correct Fiscal Year from the drop-down menu. Ensure the “Only update property values that changed” box is checked.



**Note:** If you do not see the correct Fiscal Year, contact Solutions Document Locator team at [dl@gmdsolutions.com](mailto:dl@gmdsolutions.com) and request that we add the new year. Click Ok to continue.

Once this window opens, ensure that the **only** property showing is “Fiscal Year.”



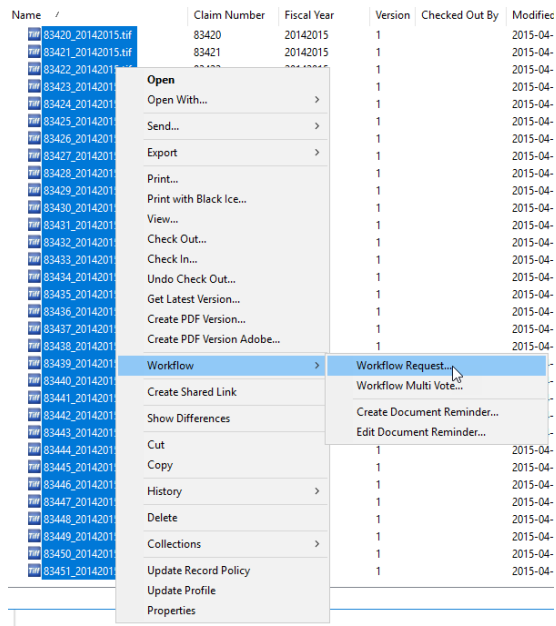
Click Yes to continue.

Once updated, request a Move and Rename CL Workflow.

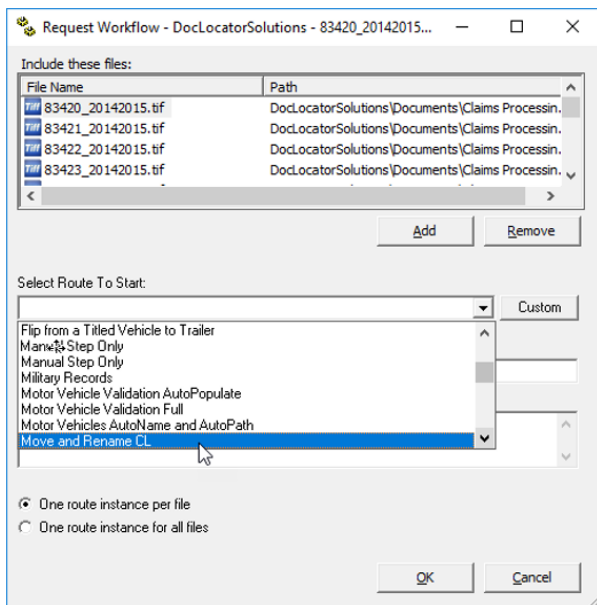
## “Solutions” Image Services

### Changing Fiscal Year Property in Claims Processing

Right click the selected documents and select “Workflow Request.”



Select the Move and Rename CL Workflow from the drop-down menu. You may have a different workflow name such as “Move and Rename Claims Processing.” If you do not see either of these workflows, contact Solutions.



Once you have selected the proper Workflow, ensure that the “One route instance per file” option is marked. This allows the Workflow to continue other documents if one stops in error.

Select Ok to continue.

Once all Workflows are complete, verify that the documents are properly named and located in the correct folder.