

CUSTOMER SERVICE SUPPORT BRANCH

Assistance Reporting Tool

Module: How to Upload a Document

TRICARE Management Activity

Table of Contents

Introduction 2
How to Upload a Document 3

Introduction

The upload feature within the Assistance Reporting Tool (ART) allows you to upload case related electronic documents (i.e., files in .doc, .pdf, .xls, .jpg, .gif, .jpeg, .png, or .tif format) and attach them to specific cases. It provides faster access to documents and reduces the risk of misplacing or losing documentation. Finally, it provides a secure location for documents that may contain personal health information or personal identifiable information.

To conserve server space, only upload unique documents, those that don't exist in any other system. For example don't upload a TRICARE Explanation of Benefits since you can easily obtain a copy from the appropriate contractor.

This module will guide you through the steps for uploading documents in ART.

How to Upload a Document

Follow the steps below:

Step 1: From the ART dashboard, open the case you want to upload documents to.



The screenshot shows the ART dashboard with three tabs: "PENDING CASES" (selected), "REFERRED IN", and "REFERRED OUT". A "+ NEW CASE" button is in the top right. Below the tabs is a table with the following data:

| Priority | Case | Case Type | Name | Provider | Date Contacted | Time Frame | Follow Up |
|----------|-------|--------------------------------|----------------|---------------|----------------|------------|------------|
| H | 80796 | Debt Collection Case (60 days) | Thompson, Bort | All Hands MRI | 03/08/2011 | 328/60 | 06/21/2012 |

Below the table is a pagination bar with "First", "Previous", "1", "Next", and "Last" buttons. A hand cursor points to the case ID "80796" in the table.

Step 2: Click the "Documents" tab.

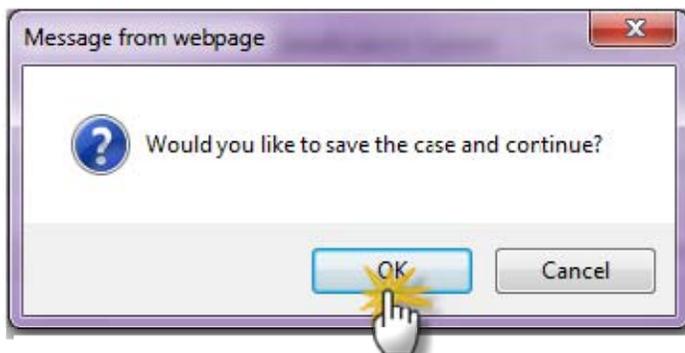
Case 80796: Thompson, Bort



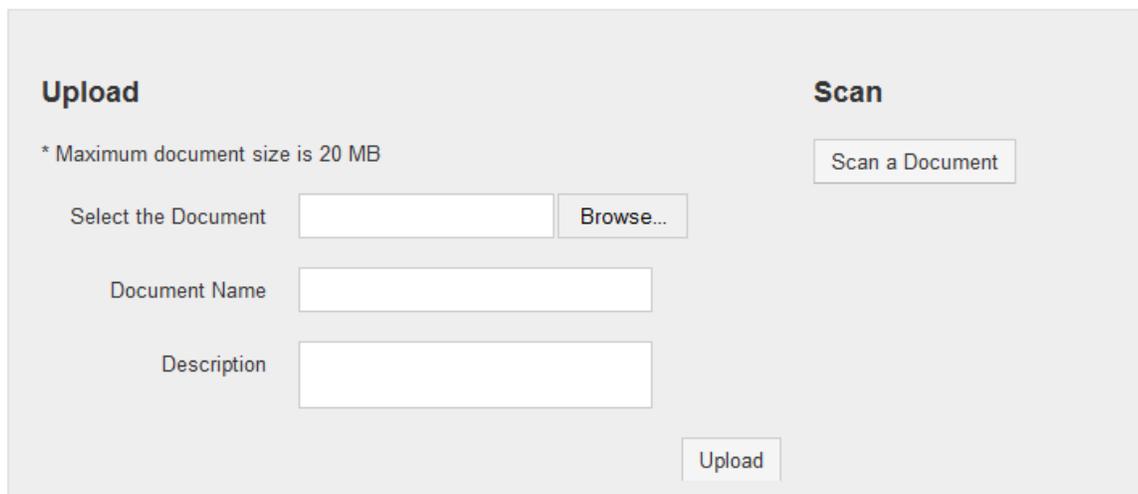
The screenshot shows the case details page for Case 80796: Thompson, Bort. There are four tabs: "BASIC INFORMATION" (selected), "CLAIMS/DEBT INFORMATION", "DOCUMENTS", and "HISTORY". A hand cursor points to the "DOCUMENTS" tab.

A pop-up window displays asking if you "Would like to save the case and continue?"

Step 3: Click the "OK" button.



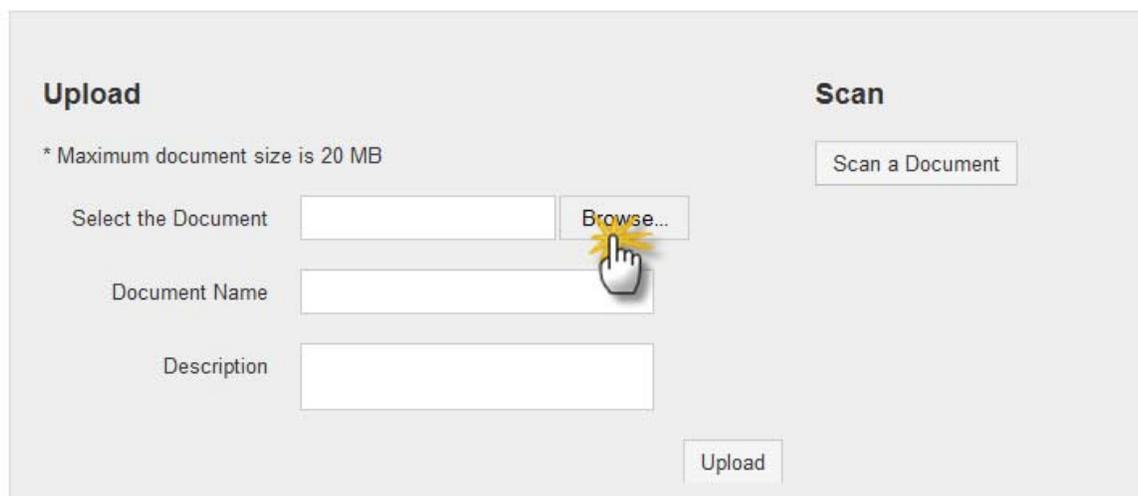
The Upload screen displays.



The screenshot shows a web interface with two main sections: "Upload" and "Scan".

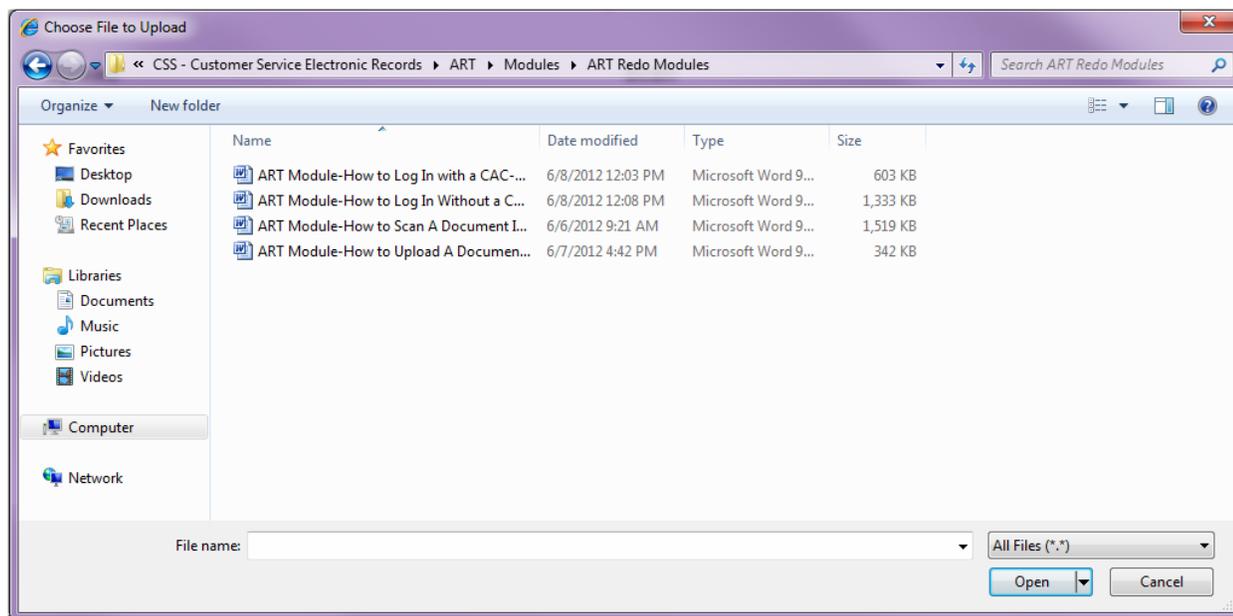
- Upload Section:**
 - Text: "* Maximum document size is 20 MB"
 - Form: "Select the Document" with an empty text input field and a "Browse..." button.
 - Form: "Document Name" with an empty text input field.
 - Form: "Description" with an empty text input field.
 - Button: "Upload" located at the bottom right of the section.
- Scan Section:**
 - Button: "Scan a Document" located at the top right of the section.

Step 4: Click the "Browse" button to search for the file you want to upload.

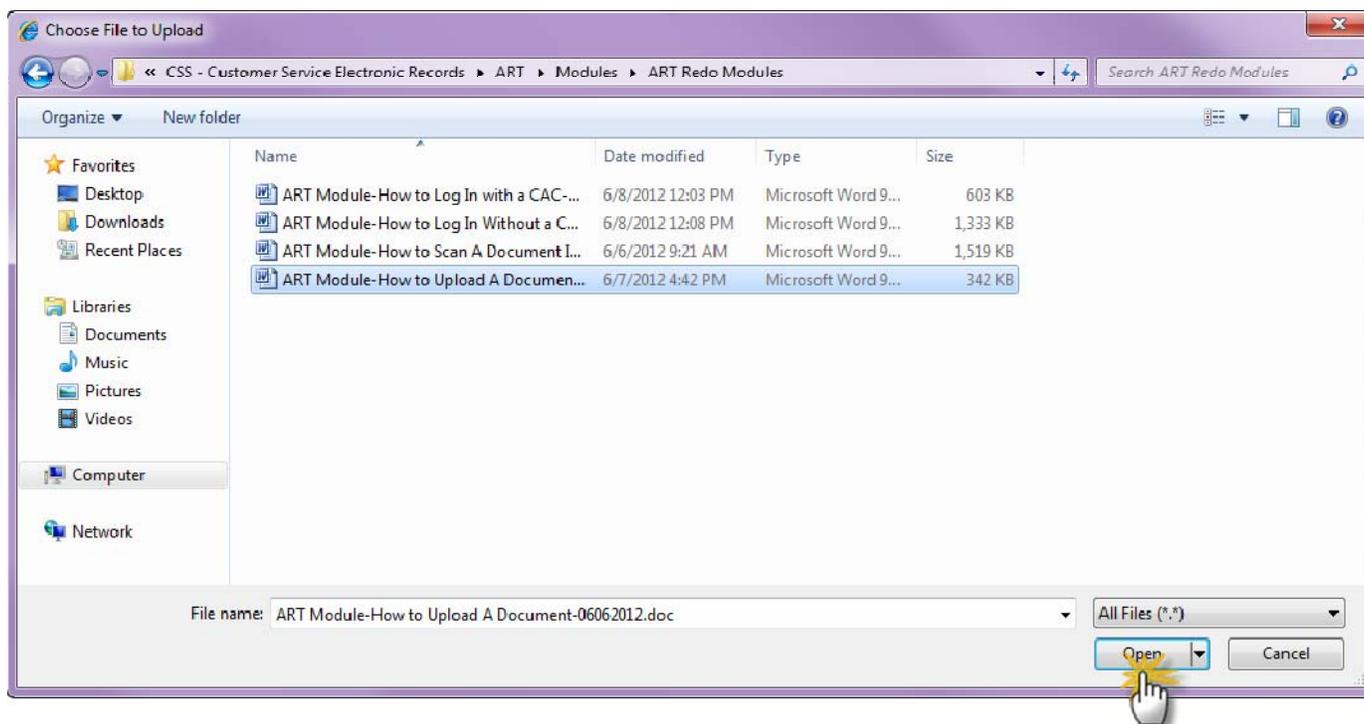


This screenshot is identical to the previous one, but with a mouse cursor icon pointing at the "Browse..." button in the "Select the Document" field, indicating the action being performed.

The “Choose File to Upload” window displays.



Step 5: Navigate to the location of the file you want to upload and select the file. The maximum size of a document you can upload is 20 megabytes.



Step 6: Click the “Open” button.

Step 7: Enter a name for your document in the “Document Name” field and a description of the file in the “Description” field. The better you name and describe your file, the easier it is to remember what you uploaded.

Upload

* Maximum document size is 20 MB

Select the Document

Document Name

Description

Scan

Step 8: Click the “Upload” button.

Your uploaded document displays below the “Upload” button.

Upload

* Maximum document size is 20 MB

Select the Document

Document Name

Description

| Date Uploaded | Document Name | File Type | Description | |
|---------------|--|-----------|------------------------------------|------------------------|
| 6/7/2012 | How to Upload A Document | .doc | Module on How to Upload a Document | Delete |

Note: Click the “Delete” button if you want to delete the document. The file will be removed from the case.