

# Tips and Tricks

## *Placing Orders*

### **How do I change a Carrier or Office after adding a product to my order?**

1. Click "Remove this product" at the bottom of each page until there are no products associated with your order
2. Click the edit tab on the Order Information section
3. Select the new Carrier or Office
4. Click the Product button in the lower right corner for the product you wish to order

Please Note: If you removed an APS, the doctor information that was used to do the facility search will still be there when you add the APS back to your order, just click Lookup Doctor/Facility to continue with your order.

### **Why are some fields marked as required only after I've added products to my order?**

EMSIOnline requires that certain information be provided depending on the type of product you are ordering (Exam, APS, etc). Understanding which fields are required will streamline the ordering process for you.

Fields that are required for specific products only become required after the product is selected. If you have not entered these fields, once you select the product, the missing required information will be indicated.

All fields indicated with an asterisk prior to product selection are required for all products. The following fields are also required by product type:

<b>APS:</b>	Applicant Zip Code
<b>Exam:</b>	Policy Amount
	Exam Location
	Applicant Preferred (Work or Home) Phone Number
<b>Inspection:</b>	Policy Amount
	Applicant Preferred (Work or Home) Phone Number

## *Linking Orders*

### **How do separate orders get linked together into a case?**

EMSIOnline uses the Policy Number and Client Case ID fields to link orders together as a single case. Here are the rules about how these fields work to link orders together:

1. If both are left blank then that order will never be matched up with another.
2. If Policy Number matches and Client Case ID is left blank then the orders will be linked.
3. If Client Case ID matches and Policy Number is left blank then the orders will be linked.
4. If neither Policy Number nor Client Case ID match then the orders will not be linked.

### **How do I order additional services for an existing applicant or a spouse?**

Open the Case Details page for the existing order by clicking on the applicant's name in any list where the existing order is visible. On the Case Details page, in the upper right corner of the applicant information section is a button labeled "Order Additional". Clicking this button will start a new order by duplicating all the policy and applicant information and take you directly to the applicant information form. There you can change the applicant information to the spouse's information and/or select the product you wish to order. This order will automatically be linked to the original order as a case.

## *Smart Folders and Color Coded Statuses*

### **When will my case get moved to the Closed/Canceled folder?**

When all products and services ordered for that case have been marked closed or canceled. If a case has 2 APSs and 1 Exam associated with it and 1 APS and the Exam are closed, the case will still be in the Open Cases folder as there is still an active APS associated with it. In this example, once the final APS is closed, the case will get moved to the Closed/Canceled folder.

## *Search Tips*

### **What methods are available for me to search for a case?**

ID Search: By policy number, confirmation number, client case ID or the case number as shown on your AutoStat report

Basic Search: By name, Social Security Number or date of birth

Advanced Search: By other case information such as ordering office or clerk, agent or agency ID, date ranges, or product t