



LoanSphere Invoicing™ Update – Copy and Resubmit Claims Procedure Document

Effective March 3, 2019

Introduction The objective of this document is to provide navigation steps for using the Copy and Resubmit Claims functionality. The feature will allow servicers to copy an original claim and all eligible line items to resubmit. Only claims with the following statuses can be resubmitted:

- **Denied**
- **Submitter Voided**
- **Void**
- **Paid with Curtailed Line Items**

Basic claim and loan information will be copied; however, other information, such as chronology and history will be displayed as though it were a newly created claim.

Procedure Steps Follow the steps below to copy and resubmit claims and line items.

1. Verify the Copy Claim button is available.
2. Enable the Copy Claim button by hovering over the Copy Claim tab.






3. Click the Copy Claim button to copy the original claim. A new claim is created using the original claim information. A new claim number can be created, and edits can be made for the resubmission.

Save & Submit | Save & Hold | Void | Notes | Print | Copy Claim

Claim Information

Vendor/Service #: Claim #: CopiedClaim  Claim Type: 571 Claim

Submitter: Copied From: [OriginalClaim](#)
Copied To:










Contact: Telephone:

Investor: Telephone:

Processor: Telephone:

Investor Loan #: Loan #:

Current Status: Hold
Claim Tags:

Inv. Note	N	I	Department	Subcategory	Is a Copy	Date
			Property Pres.	Lockbox	Y	2/7/2019
Completed Date: 01/16/2019						
			Property Pres.	Landscaping - Trim Trees, Shrubs and Vines	Y	2/7/2019
Completed Date: 01/28/2019						
			Property Pres.	Initial Grass Cut - Perimeter - under an acre	Y	2/7/2019
Completed Date: 01/28/2019						
Total:						

NOTE: Copied line items will be marked “Y” to show it has been copied and the original claim will be in a “read only” status. The Copy Claim button will be disabled.

4. A hyperlink is created to link the original claim to the copied claim.

Claim Information

Vendor/Service #: Claim #: CopiedClaim Claim Type: 571 Claim

Submitter: Copied From: [OriginalClaim](#) 
Copied To:

Contact: Telephone:

Investor: Telephone:

5. A hyperlink is also created to link the copied claim to the original claim.

Claim Information

Vendor/Service #: Claim #: CopiedClaim Claim Type: 571 Claim

Submitter: Copied From: [OriginalClaim](#) 
Copied To:

Contact: Telephone:

Investor: Telephone:



- When editing existing lines on a copied claim, the Category and Subcategory cannot be changed. Line items can be added or deleted, if necessary.

- The normal submission process can be used to resubmit a copied claim.

There are instances when a claim cannot be copied. In those instances the Copy Claim button will be disabled and one of the following messages will appear when hovered over:

- Claim was previously copied
- Claim is not in a status of Denied, Submitter voided, Void or Paid with curtailed line items
- Claim status or exported date is not within the allowable timeframe
- You do not have access to copy claims
- Another claim is currently on hold for this investor loan number

NOTE: Multiple users will not be able to open the same claim in Denied, Submitter Voided, Void, or Paid with Curtailed Line Items. If one user has a claim open, the subsequent user viewing the claim will see a message stating the claim is locked and the **Copy Claim** button will be disabled. When a claim is opened in a pop-up window (e.g. using the claim hyperlink from the History Tab), the Copy Claim button will also be disabled.