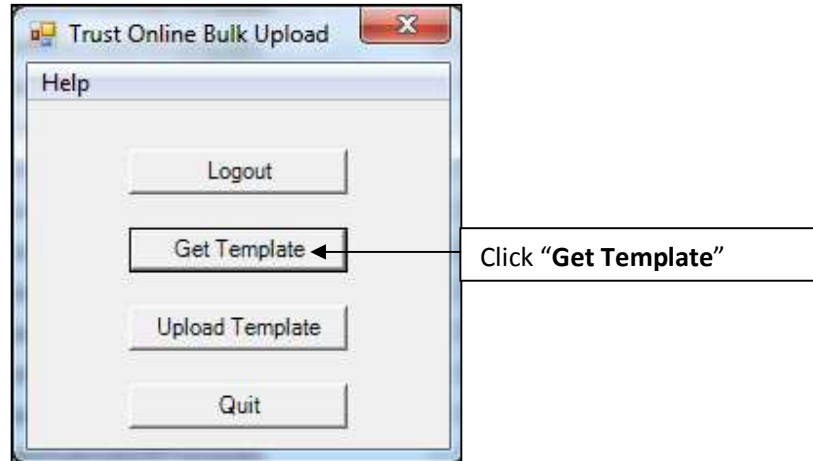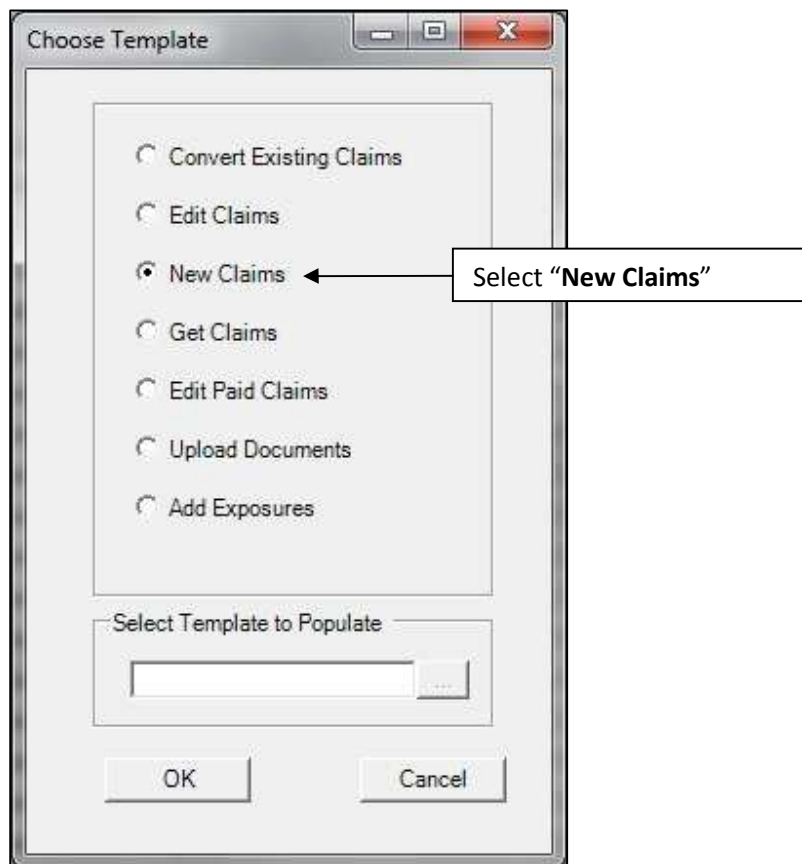## Bulk Upload New Claims Tool
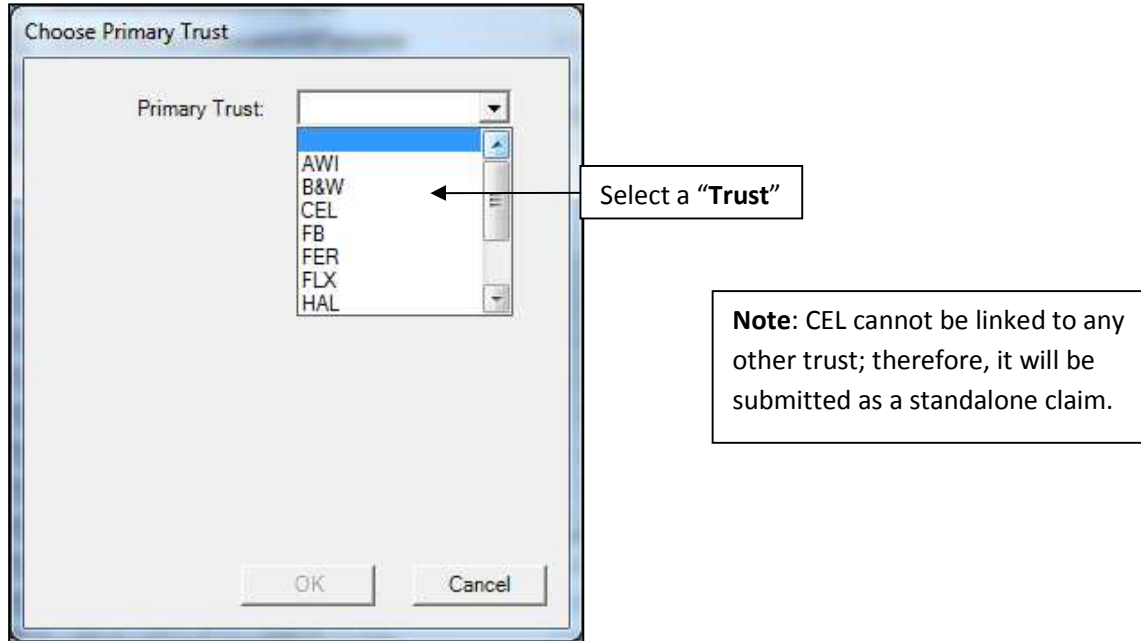
1. To submit new claims, first log into the Bulk Upload tool and click on the Get Template button.


Click "**Get Template**"

2. The "**Choose Template**" box will appear with a list of templates that are available for downloading. Click on the "**New Claims**" template to download it.


Select "**New Claims**"

3. The "**Choose Primary Trust**" box will appear with a drop-down of Trust that the user has access too. Select the Trust for the new claims submissions.

Select a "**Trust**"

Note: CEL cannot be linked to any other trust; therefore, it will be submitted as a standalone claim.

4. After selecting the Trust and clicking the OK button. A "**Save BulkUpload Template**" box will appear prompting the user to save the new template. At this point the user may rename the file or leave the default name and select the directory where the new template will be stored.


Select the directory where the new template will be saved and stored.
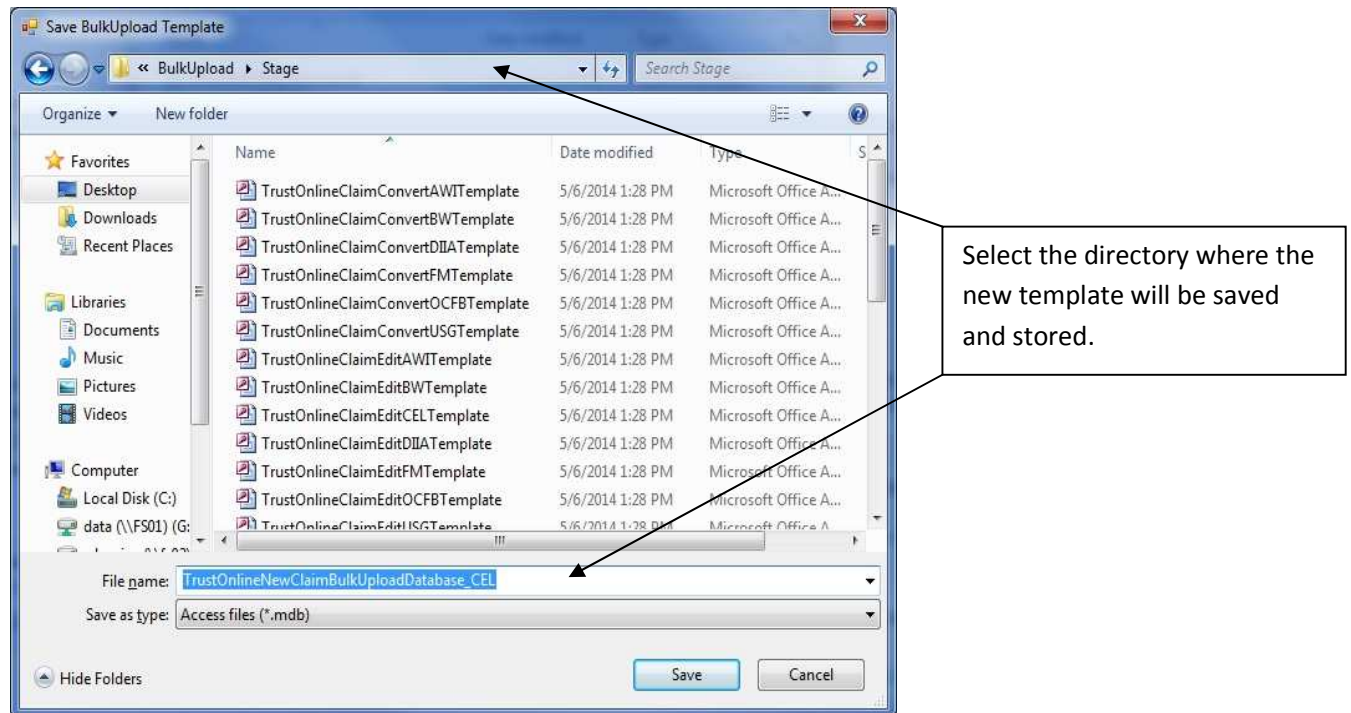
5. After downloading the new template, double click on the file to open it. Find the claim tables located in the tables view of the Access database and open the "**injured**" table to begin entering data for the new claim submissions. The "**injured**" party table must first be populated with data before any other tables.   All other tables are linked to the injured party table through the **SSN** field (*Injured Table's Primary Key*).

Open "**injured**" table.
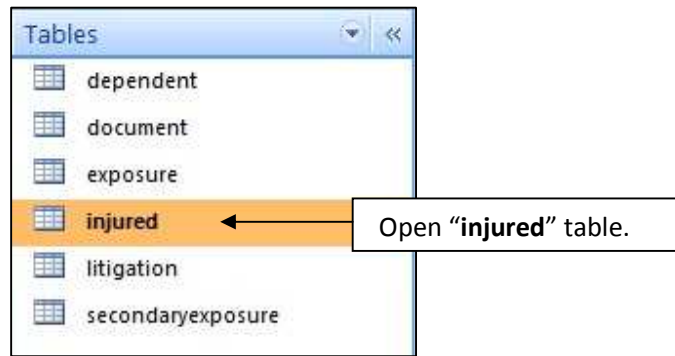
6. As you can see in the following example, when the '**injured**' party table is missing the SSN, all of the other tables such as the litigation and exposure tables do not have any data in the SSN drop-down and cannot be updated directly.

The '**SSN**' field is left blank in the injured table.

There are no '**SSN's** to select in the drop-down.
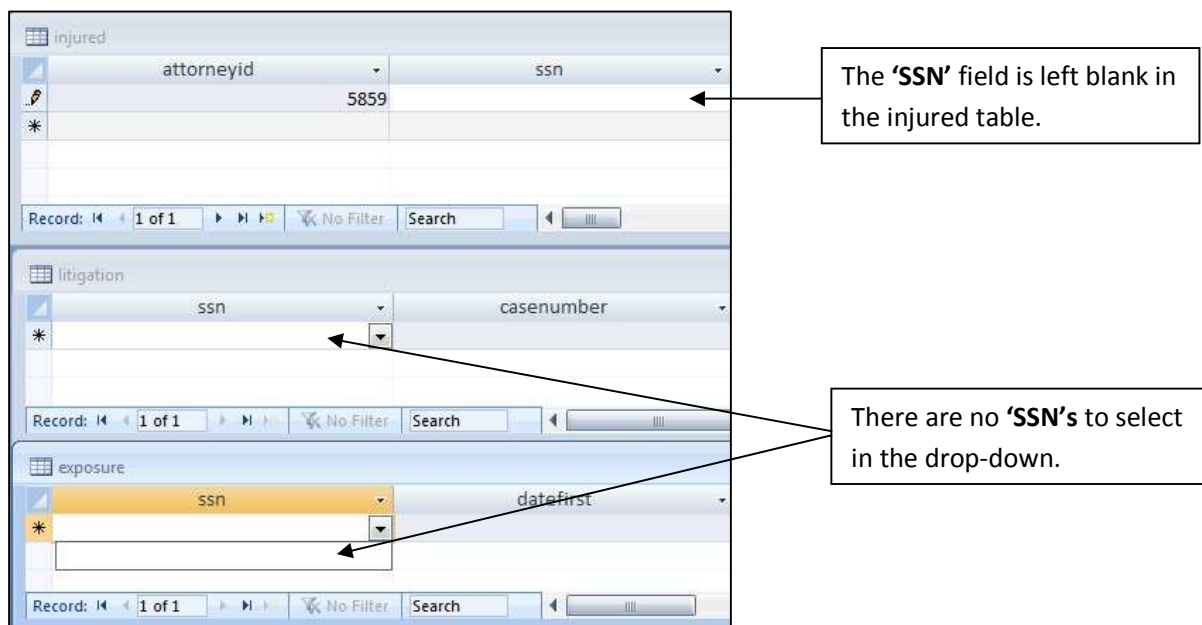
7. Besides the SSN field, there are other look-up fields in the tables that require a specific ID instead of the actual value. These values can be found in the '**READONLY_**' tables located immediately below the claims table.

Click on a 'READONLY' table to view the specific IDs.
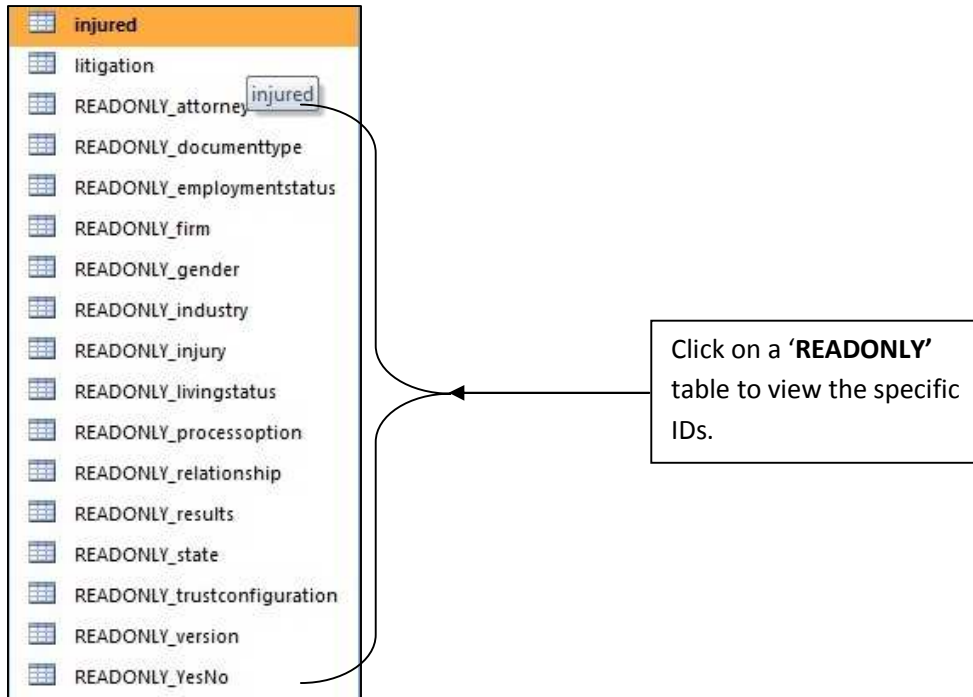
8. By double clicking on the **'READONLY_industry'** table shown in the previous image, you will see the industry ids and description of the industry.

id	description
543	10: Asbestos mining
544	11: Aerospace/Aviation
545	12: Asbestos abatement
546	13: Automotive/Mechanical Friction
547	16: Chemical
548	17: Construction

9. By double clicking on the Exposure table, you will see that the '**industryid**' field is looking up data from the **'READONLY_industry'** table.

employer	industryid	industryother	occupation

543	10: Asbestos mining
544	11: Aerospace/Aviation
545	12: Asbestos abatement
546	13: Automotive/Mechanical Friction
547	16: Chemical
548	17: Construction
549	18: Iron & Steel
550	19: Longshore

10. As part of the Bulk Upload Tool, we have also provided the user with an excel spreadsheet labeled the "**Bulk Upload Data Dictionary**" that displays the user friendly name of each field. You'll notice that the' **industryid'** located under the Template Field heading corresponds to Industry question from the claim form.

Claim Form Question	Template Field
Occupational Exposure	
Firm Reference Number	firmreferencenumber
Date Exposure Began	datefirst
Date Exposure Ended	datelast
Was the injured party employed by Celotex, Philip Carey	exposedwhileemployee
Did the injured party work at a site while Philip Carey, Car	workedatsiteforotherentity
Did the injured party work with Celotex, Philip Carey or Ca	workedwithentityemployees
Did the injured party live or work near or in the vicinity of a	proximitytoexposuresite
Occupation	occupation
Description of Job Duties	occupationduties
Industry in which exposure occurred	**industryid**
If Code 37 (Other), specify	industryother

Note: There are several ways to populate the tables in the Bulk Upload Tool. The methods range from beginners updating individual fields in the tables, to using exported Excel spreadsheet to update the tables, to advanced access programmers creating scripts to pull data from the user's database right into the tables. For the purpose of this tutorial, we will be focusing on the **beginner's method** of updating the individual fields in the tables.

11. With the **injured** table opened, enter all of the necessary information. The injured table includes the following section of the claim form: **Representation**, **Process**, **Injured Party**, **Injuries, Smoking History, Disability, Employment** and **Comments.**

attorneyid	ssn	processoptionid	lastname	firstname	middleinitial	gender

12. With the **exposure** table opened, enter all of the necessary information. You may add multiple exposure records for each of the claimants listed in the injured table.

ssn	datefirst	datelast	employer	industryid	industryother	occupation

13. With the **litigation** table opened, enter all of the necessary information. You may only add a single litigation record for each of the claimants listed in the injured table.

ssn	datefiled	nameofcourt	receivedmoney	previouslitigation	statefiled
			Unspecified	Unspecified	

14. With the **dependent** table opened, enter all of the necessary information. You may add multiple dependent records for each of the claimants listed in the injured table.

| ssn	fullname	birthdate	financiallydependent	relationshipcode	otherrelationship
			Unspecified		

15. With the **secondary exposure** table opened, enter all of the necessary information. You may add multiple secondary exposure records for each of the claimants listed in the injured table.

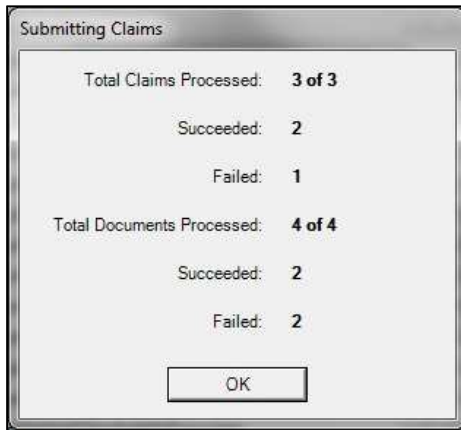| ssn	oepssn	exposedtooep	exposuredesc	exposurestartdate	exposureenddate
		Unspecified			

16. With the **document** table opened, enter all of the necessary information. You may add multiple documents for each of the claimants listed in the injured table.

documentid	ssn	path	documenttypeid	comment	success
(New)					

17. After entering all of the information into the necessary tables, close the template. Log back into the Bulk Upload Tool and click on the Upload Template button.

Click "**Upload Template**"
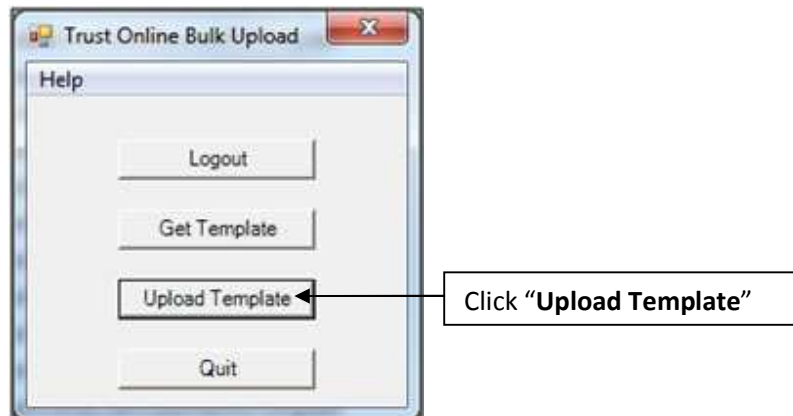
18. The "**Upload BulkUpload Database**" box will be open, prompting the user to select the "**New Claims**" template that has the claims that will be submitted. After selecting the correct template, click "**Open**" to begin submitting the new claims.

Submitting Claims	
Total Claims Processed:	3 of 3
Succeeded:	2
Failed:	1
Total Documents Processed:	4 of 4
Succeeded:	2
Failed:	2
OK	

The "**Submitting Claims**" box will display the total claims successfully submitted and the failed submissions. As well as any documents that was successfully or unsuccessfully uploaded

For the Failed claim submissions, open the template and the "**READONLY_results**" table for information on why the submission failed. For the Failed document uploads, open the "**document**" table and check the message field which will provide a brief description of why the documents failed to upload.

After making corrections to the failed claim submissions and documents, you may log back into the Bulk Upload Tool and re-upload the template with the corrections.