OCTOBER 2020

DELAWARE
CLAIMS
PROCESSING
FACILITY

# TRUST ONLINE USER MANUAL

**Celotex Asbestos Settlement Trust**

## Table of Contents

*Chapter 1 Firm Super User* ..... *1*

**The Firm Super User Account** ..... **1**

**Creating Accounts** ..... **3**

**User Accounts** ..... **3**
Staff Accounts ..... 3
Attorney Accounts ..... 4

**Two-Step Verification** ..... **4**
The TFA Process ..... 4
TFA Authenticator App ..... 5

**User Account Option** ..... **5**
Enabling/Disabling Accounts (Check Box) ..... 5
Read Only (Check Box) ..... 5
Receive Announcements (Check Box) ..... 6
View Summary Statistics(Check Box) ..... 6
Hide Total Payment Statistics(Check Box) ..... 6

**User Account Affirmation Message** ..... **7**

**Managing User Access** ..... **7**

**Access By Accounts** ..... **8**

**Access By Attorney** ..... **8**

**Access By Trust** ..... **9**

**Password Expiration** ..... **9**

**Temporary Password** ..... **10**

**Firm Super User Profile** ..... **11**

**Payment Option** ..... **12**

**Firm Payment Notifications** ..... **12**

**Attorney Options** ..... **13**

*Chapter 2 Trust Online User Login* ..... *14*

**Trust Online Two-Factor Authentication** ..... **14**

**TFA Process – Requesting the Verification Code** ..... **14**

**TFA Authenticator App over SMS** ..... **15**
Setting Up Authenticator App ..... 15
Remember this Computer (Check Box) ..... 17
Email & Text Message Setup ..... 18
Signing onto Trust Online ..... 18

*Chapter 3 Trust Online User Functions* ..... *20*

**Claim Search** ..... **20**

**Search Results** ..... **21**

**Downloading Results** ..... **22**

**The Claim** ..... **22**

**General Tab** ..... **22**
Button Functions ..... 23
Place In Queue ..... 23
Firm Passkey ..... 23

**Documents** ..... **24**
Document Submission ..... 24
Viewing/Downloading Documents ..... 25
Claim Document Download Threshold ..... 25
Archived Documents ..... 26

**Releases & Payments Grid** ..... **27**

**Updates Pending** ..... **28**

**Deficiency Tab** ..... **29**
Standard Deficiency ..... 29
Intake Deficiency ..... 29
Review Deficiency ..... 29
Release Deficiency ..... 29

**Changes Tab** ..... **30**
Filter ..... 30
Expand All | Collapse All ..... 30

**Editing Claims** ..... **34**

**New Claim Submission** ..... **34**
Representation ..... 35
Process ..... 35
Injured Party ..... 35
Injuries ..... 35
Dependent ..... 35
Occupational Exposure ..... 36
Secondary Exposure ..... 36
Smoking History ..... 36
Litigation ..... 36
Disability ..... 36
Employment ..... 36
Documents ..... 36
Finish Claim ..... 36

*Chapter 4 Trust Online Reports* ..... *37*

**Reports** ..... **37**

**Deficiency Reports** ..... **37**

**Place In Queue Report** ..... **38**

**Claim Status by Trust** ..... **39**

**Payment Extract** ..... **39**

**Claims Under Edit** ..... **40**

*Chapter 5 Trust Online Notifications* ..... ***42***

**Notifications** ..... **42**

**Firm Level Notifications** ..... **42**

**Attorney Level Notifications** ..... **44**

*Chapter 6 Celotex Conversion* ..... ***46***

**Conversion** ..... **46**

**Linking** ..... **46**

**Conversion Process** ..... **46**

Review Results ..... 48

Deficiencies ..... 48

Warnings ..... 48

Documents ..... 49

# Chapter 1 Firm Super User

## The Firm Super User Account

The Delaware Claims Processing Facility has created a super user-friendly web-based secured environment to assist firms in the submitting, updating and settling of asbestos related claims. This innovative website supplies firm users with all of their claimant's information at a click of a button.

In addition to the Trust Online website, DCPF provides training and technical support for all Trust Online related issues. In addition to the secured website, each Trust has their own public website that provides valuable resources, downloads, news articles, medical/exposure requirement information and much more. The News section also includes any and all enhancements made to Trust Online in response to feedback from current firms using the site.

Firms that wish to sign up to use Trust Online, must first have a partner or member of the firm complete an Electronic Filer Agreement (E-filer) and send the completed E-filer back to the Facility for processing. A **Firm Super User** (FSU) account will be created for the partner or member who signed the E-filer. The firm must complete an E-filer agreement for each Trust that they would like to access through Trust Online. The E-filers are located on the Downloads page of the specific Trust public website.

Once the E-filer has been processed by the Facility, a Trust Online package will be sent, which includes a letter with the FSU's username and password, a copy of the processed E-filer and this instructional manual to Trust Online.

With the username and password in hand, the FSU will need to log into Trust Online to begin *creating accounts* for their staff and *setting the notification preferences*. To get to the login page, proceed to any of the public websites, such as the **Celotex Asbestos Settlement Trust**, and click on the Login link located on the right menu bar.

By clicking on this Login link, you will be directed to the Trust Online login page. Each and every time a user chooses to log into Trust Online, they must click on the 'I Agree' check box immediately below the disclaimer. By clicking on this check box, the user is agreeing to the terms specified in the E-filer.

Enter the username and password from the letter and click on the Login button. The user should keep in mind that the password is case sensitive and will disable the account after the third incorrect login attempt.

After successfully logging in to Trust Online with the password and verification code, the firm super user will be directed to the Summary page. At the top of this page, the user's information is displayed which includes the user's full name, username, email address and the firm's name, address and any CEL Alerts.

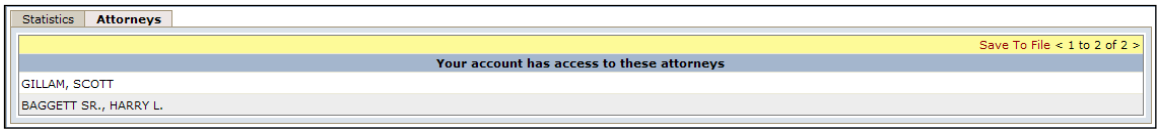
The lower section of this page is divided into two tabs, the Statistics and Attorneys view. This section defaults to the Statistics view which displays all claims submitted by the firm, total payments made to the firm and a claim status breakdown of all claims submitted for each Trust the user has access to view.

Statistics | Attorneys

Summary Statistics as of 4/25/2013 9:00:01 AM

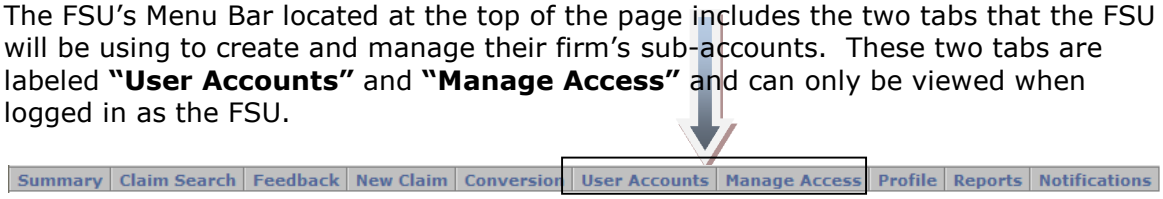
| Description | AWI | B&W | CEL | FB | FER | FLX | HAL | HW | OC | T&N | USG |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Total Claims Submitted | 27,019 | 21,532 | 17,121 | 26,475 | 7,330 | 16,338 | 6,656 | 6,641 | 26,517 | 18,990 | 25,711 |
| Total Payments | $26,529,364 | $25,805,524 | $11,208,236 | $15,292,540 | $0 | $442,642 | $2,250,939 | $9,046,966 | $53,473,727 | $2,618,489 | $45,097,026 |
| Ready to Review | 1,422 | 2,121 | 1,027 | 556 | 0 | 461 | 746 | 1,133 | 666 | 388 | 466 |
| Intake Deficient | 269 | 741 | 180 | 904 | 0 | 32 | 219 | 152 | 896 | 6 | 35 |
| Review | 101 | 57 | 71 | 54 | 0 | 66 | 4 | 5 | 48 | 231 | 338 |
| Review Complete | 377 | 59 | 359 | 82 | 0 | 43 | 149 | 54 | 86 | 49 | 141 |
| Awaiting Quality Assurance | 138 | 181 | 0 | 78 | 0 | 51 | 171 | 105 | 41 | 61 | 121 |
| In Quality Assurance | 0 | 6 | 1 | 0 | 0 | 5 | 18 | 7 | 0 | 2 | 11 |
| Review Deficient | 1,442 | 2,462 | 2,935 | 2,672 | 0 | 5,375 | 1,383 | 1,001 | 2,256 | 5,796 | 1,511 |
| Ready to Re-Review | 929 | 126 | 434 | 1,173 | 0 | 609 | 143 | 77 | 803 | 347 | 589 |
| Offer Issued | 951 | 332 | 153 | 640 | 0 | 653 | 15 | 6 | 631 | 812 | 675 |
| Release Verified | 23 | 67 | 0 | 41 | 0 | 24 | 1 | 0 | 40 | 64 | 20 |
| Release Deficient | 26 | 10 | 27 | 23 | 0 | 8 | 3 | 1 | 27 | 19 | 24 |
| Paid | 11,084 | 7,333 | 9,972 | 8,935 | 0 | 0 | 317 | 536 | 10,279 | 1 | 10,711 |
| Partial Payment Paid | 0 | 0 | 894 | 67 | 0 | 3,208 | 0 | 0 | 295 | 4,792 | 0 |
| Payment Authorization | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Deferred | 8,770 | 1,304 | 161 | 5,539 | 1 | 1,832 | 269 | 316 | 4,393 | 2,686 | 5,809 |
| Do Not Review | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Withdrawn | 1,145 | 6,307 | 906 | 5,452 | 7,329 | 3,156 | 2,593 | 2,359 | 5,764 | 3,515 | 4,859 |
| Disallowed | 0 | 0 | 0 | 0 | 0 | 0 | 595 | 859 | 0 | 0 | 0 |
| Deemed Withdrawn | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Hold | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Draft | 2 | 11 | 0 | 1 | 0 | 1 | 8 | 0 | 3 | 0 | 5 |
| Research | 342 | 426 | 0 | 259 | 0 | 815 | 30 | 30 | 292 | 221 | 401 |

The Attorneys tab displays the list of attorneys for which the user has access to *view*, *edit* or *submit claims*.




The FSU's main function is to *create sub-accounts* and *manage access* for their staff and attorney(s) as well as *setting the notification preferences* for each attorney that have submitted and will be submitting claims on Trust Online.

The FSU's Menu Bar located at the top of the page includes the two tabs that the FSU will be using to create and manage their firm's sub-accounts. These two tabs are labeled **"User Accounts"** and **"Manage Access"** and can only be viewed when logged in as the FSU.



# Creating Accounts

As noted in the previous sections, one of the main functions of the FSU is to create accounts for staff and attorneys to provide access to Trust Online. Although, these accounts seem very similar when creating them, one of the main differences is that the attorney account is always associated with an Active Attorney.

The attorney account is not to be confused with the actual active practicing attorney from the law firm. An attorney accounts gives the representing attorney more control over their claims by allowing them to set their own *notifications preferences*.

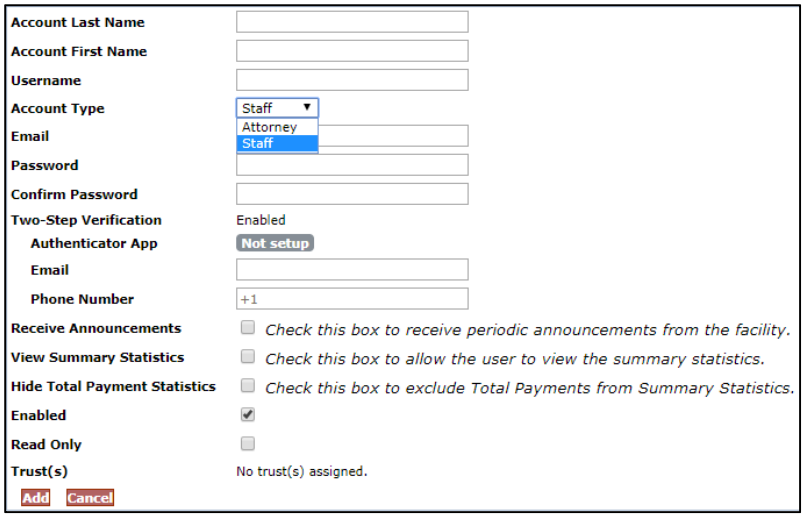
In this next section, we will explain how to create accounts and the vital differences between them. We will also explain how to *enable "disabled accounts", reset passwords* and *disable "enabled accounts"*.

To begin creating accounts, click on the **<User Accounts>** tab located on the Menu Bar. From this page, click on the **<Add Account>** button to begin creating accounts.

# User Accounts

## Staff Accounts

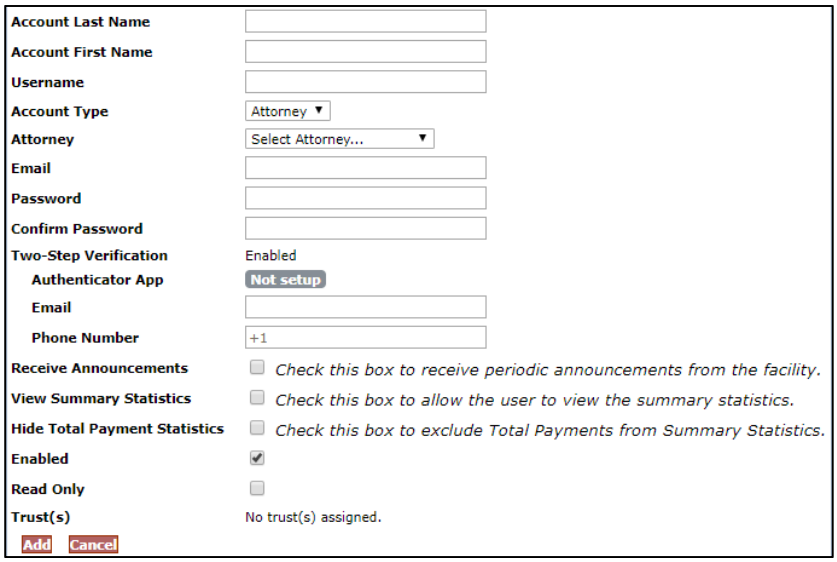
To create a staff account, first select **Staff** from the **Account Type** drop-down box and enter the *Account Last Name*, *First Name*, *Username*, *Password*, *Confirm Password* and *Email*. Place a check mark next to the **"Enable"** box and any other boxes that are necessary and click the **<Add>** button. The other three boxes will be explained in detail in the upcoming section.



## Attorney Accounts

To create an attorney account, select **Attorney** from the **Account Type** drop-down box. The **Attorney** drop-down box will appear with the available attorneys for your firm. If an attorney is *not* listed in this drop-down box, you will have to contact the Trust to have this attorney added before you can create this account.

If the attorney is listed in this drop-down box, select the respective attorney and enter the necessary account information. Place a check mark next to the appropriate boxes and click the <**Add**> button to save.




# Two-Step Verification

As an added security feature, Trust Online requires Two-Factor Authentication (TFA) in order to log into Trust Online. This will be required for all staff and attorney accounts, as well as the firm super user account.

TFA provides a second layer of security, in addition to your password, by requiring the user to verify a separate and unique verification code.

### The TFA Process

Trust Online will provide three options for receiving the TFA verification code:

- TFA Authenticator App (preferred method)
- Email
- Text Message (to a mobile device)

Users can choose one or more of these options; however, the preferred option is the TFA Authenticator App. If you are unable to use the App, TFA verification codes can be received through Email or Text Message.

### TFA Authenticator App

We recommend downloading and using one of the following mobile apps:

- Google Authenticator
- Microsoft Authenticator
- Duo Mobile

## User Account Options

### Enabling/Disabling Accounts (Check Box)

The Enabled check box will need to be checked in order for users, *staff and attorneys*, to be able to log into Trust Online. The Enabled check box will automatically become unchecked when the system identifies a user attempting to log into Trust Online more than three times with an incorrect password.

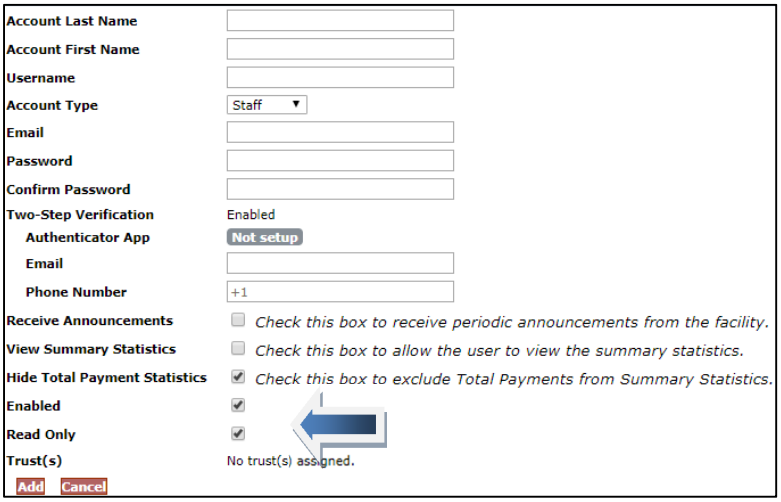
In this case, the FSU will need to re-enable the account by placing a mark next to the Enabled check box and clicking the **<Save>** button.

In this same manner, the FSU must disable accounts that are no longer with the firm by removing the check mark next to the Enabled box and clicking the **<Save>** button. This will eliminate the risk of any unauthorized personnel from logging onto Trust Online.

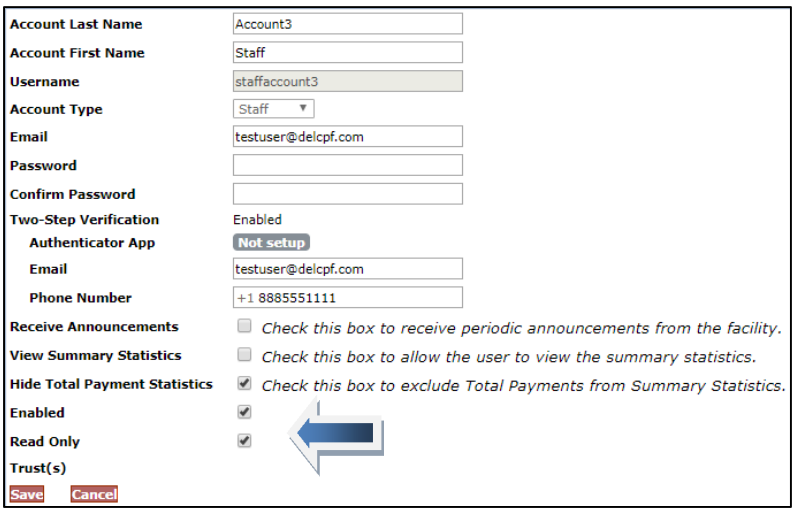
### Read Only (Check Box)

Read Only accounts are accounts that are limited to *creating reports, viewing claim information* and *viewing/printing notifications*. Firms can set both *new* and *existing* accounts to Read Only.

When creating a new account, after entering all of the necessary account information, check the **Read Only** box and click the <**Add**> button.




For existing accounts, search for the account and click on the account name to view the account profile. Afterwards, check the **Read Only** box and click the <**Save**> button.




### Receive Announcements (Check Box)

The Receive Announcements check box was created for firm users who would like to receive periodic announcements from the Facility. When creating a new account, after entering all of the necessary account information, check the **Receive Announcements** box and click the <**Add**> button.

For existing accounts, search for the account and click on the account name to view the account profile. Afterwards, check the **Receive Announcements** box and click the <**Save**> button.

### View Summary Statistics (Check Box)

The View Summary Statistics check box was added for Firm Super Users to restrict their Staff and Attorney accounts from viewing the Summary Statistics on the Summary Page.

When creating a new account, after entering all of the necessary account information, check the **View Summary Statistics** box and click the <**Add**> button.

For existing accounts, search for the account and click on the account name to view the account profile. Afterwards, check the **View Summary Statistics** box and click the <**Save**> button.

### Hide Total Payment Statistics (Check Box)

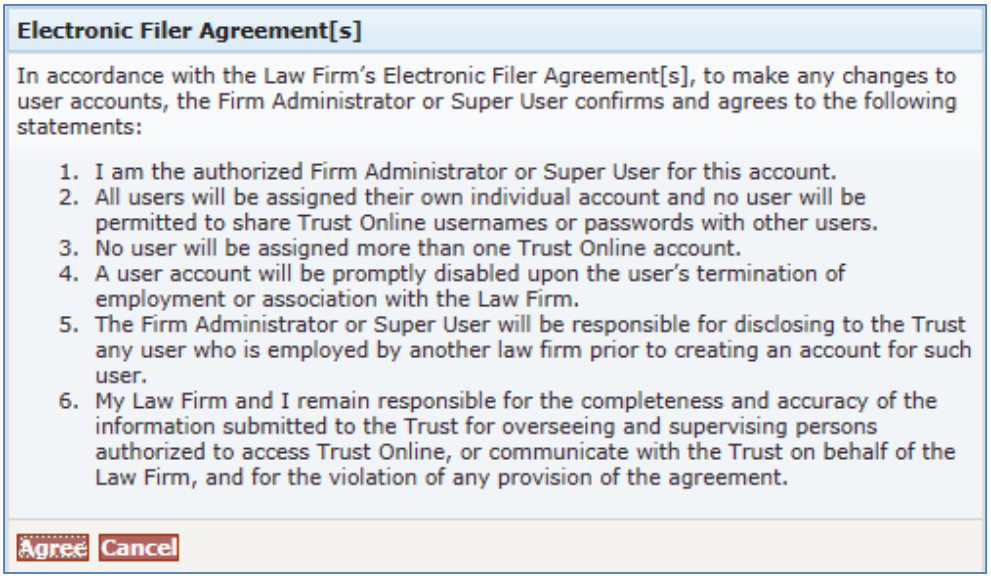
The Hide Total Payment Statistics check box was added for Firm Super Users to restrict their Staff and Attorney accounts from viewing the Total Payments on the Summary Page.

When creating a new account, after entering all of the necessary account information, check the **Hide Total Payment Statistics** box and click the <**Add**> button.

For existing accounts, search for the account and click on the account name to view the account profile. Afterwards, check the **Hide Total Payment Statistics** box and click the <**Save**> button.

**User Account Affirmation Message**

After entering all of the information for the new user, a message will appear every time a new Staff or Attorney account is being added. In order to add the new account, the FSU will be required to select the 'Agree' box before proceeding which affirms that all of the statements listed in the message are true and are being carried out according to the Electronic Filer Agreement.



**Electronic Filer Agreement[s]**

In accordance with the Law Firm's Electronic Filer Agreement[s], to make any changes to user accounts, the Firm Administrator or Super User confirms and agrees to the following statements:

1. I am the authorized Firm Administrator or Super User for this account.
2. All users will be assigned their own individual account and no user will be permitted to share Trust Online usernames or passwords with other users.
3. No user will be assigned more than one Trust Online account.
4. A user account will be promptly disabled upon the user's termination of employment or association with the Law Firm.
5. The Firm Administrator or Super User will be responsible for disclosing to the Trust any user who is employed by another law firm prior to creating an account for such user.
6. My Law Firm and I remain responsible for the completeness and accuracy of the information submitted to the Trust for overseeing and supervising persons authorized to access Trust Online, or communicate with the Trust on behalf of the Law Firm, and for the violation of any provision of the agreement.

Agree Cancel

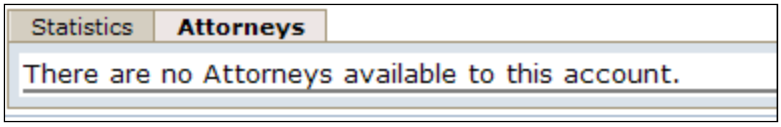
If the FSU does not agree to the affirmation message and instead clicks the Cancel button, the new account will not be created.

**Note**: After the accounts are created, each and every time the user accounts are updated by the FSU, the FSU will be required to 'Agree' to the terms in this affirmation message before submitting the changes.

## Managing User Access

After creating the user accounts for the firm, the FSU must assign the *staff* and *attorney accounts* access to specific Trusts using the **Manage Access** page. If the user attempts to login without any Trust access, they will see an error message directing them to contact their FSU.

Unlike the attorney accounts, staff accounts are not associated with any attorney; therefore, once a staff account is created, the firm administrator will have to assign an attorney to these accounts before they may submit new claims or edit existing claim data. If there aren't any attorneys assign to the user, the Attorney's tab on the Summary page will display a message stating the following:

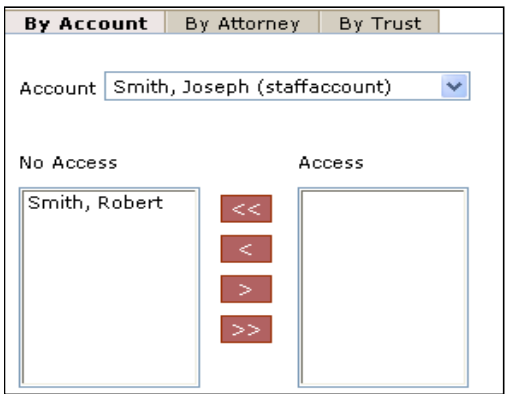



To assign attorney access to the staff accounts, click on the **Manage Access** link on the top menu bar. The Manage Access page will display three tabs, ***By Account***, ***By Attorney*** and ***By Trust.*** The FSU can utilize either ***By Account*** or ***By Attorney*** to begin assigning specific Attorney access to the staff accounts and will use the ***By Trust*** tab to begin assigning the user accounts access to specific trust.

Generally, when attorney accounts are created, they are already associated with a specific attorney but they can also be given access to additional attorneys using the **Manage Access** link. This additional access allows the attorney account to view and edit claims submitted by other attorneys.

## Access By Account

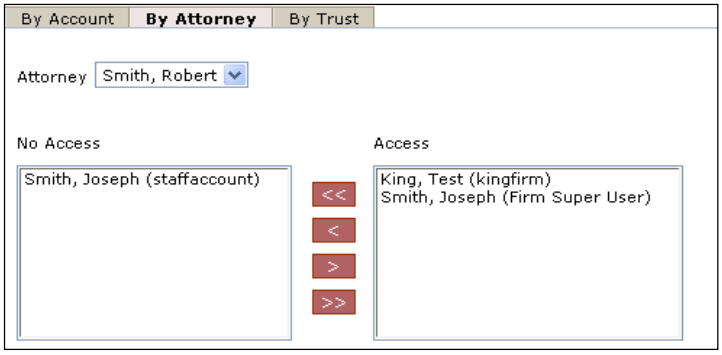
To assign access by accounts, click on the <**By Account**> tab and select an account from the drop-down box. From the **No Access** list box, select one or more of the attorneys that are to be associated with this account. Click on the > to move the selected attorney to the **Access** list box. To allow access to all attorneys listed, simply click on the >>.




To remove access, select one or more of the attorneys from the **Access** list box and click on the < to move the selected attorneys to the **No Access** list box. To remove access to all attorneys listed, click on the <<.

## Access By Attorney

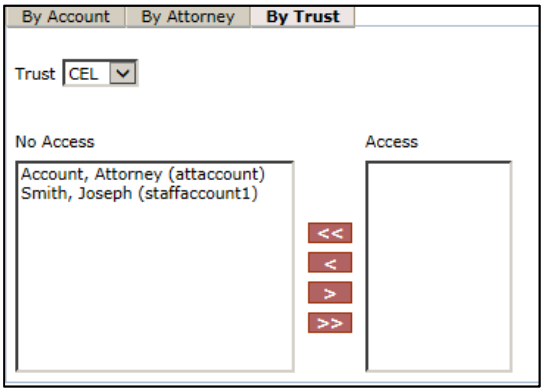
To assign access by attorneys, click on the <**By Attorney**> tab and select an attorney from the drop-down box. From the **No Access** list box, select one or more of the accounts that are to be permitted access to the attorney in the drop-down box. Click on the > to move the selected accounts to the **Access** list box. To allow access to all accounts listed, simply click on the >>.




To remove access, select one or more of the accounts from the **Access** list box and click on the < to move the selected accounts to the **No Access** list box. To remove access to all accounts listed, click on the <<.

## Access By Trust

After assigning the attorney(s) access, you will need to assign the Trust(s) using the ***By Trust*** tab. To assign access by trust, click on the <**By Trust**> tab and select a trust from the drop-down box. From the **No Access** list box, select one or more of the accounts that are to be permitted access to the specified trust in the drop-down box. Click on the > to move the selected accounts to the **Access** list box. To allow access to all accounts listed, simply click on the >>.

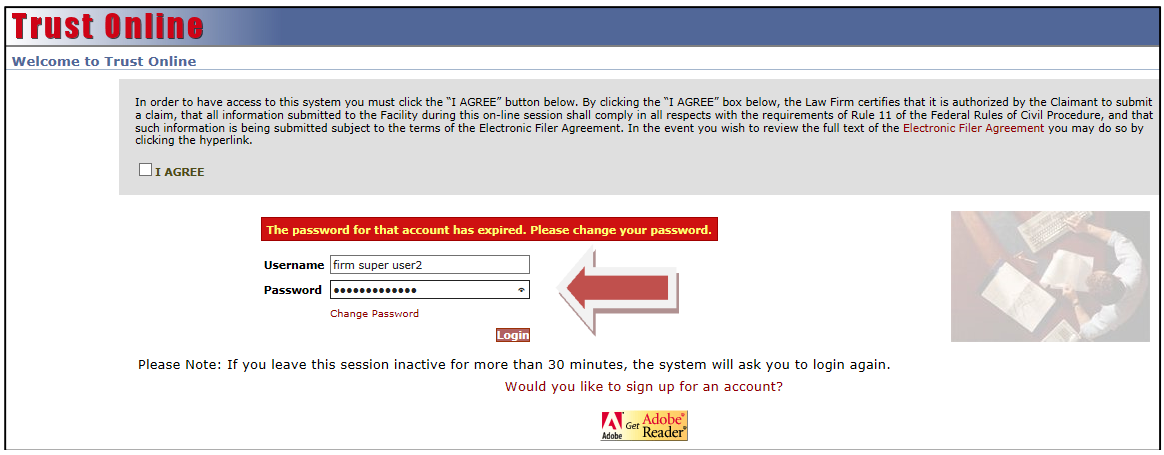



To remove access, select one or more of the accounts from the **Access** list box and click on the < to move the selected accounts to the **No Access** list box. To remove access to all accounts listed, click on the <<.

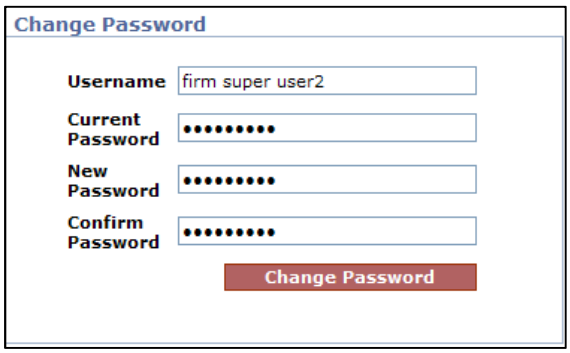
### Password Expiration

The passwords for the FSU and all accounts created by the FSU have a 90 day expiration date. This added security feature will assist in preventing unauthorized users from accessing the firm's secured confidential data.

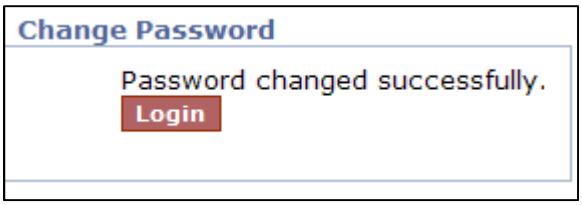
When the password expires, you will receive a message when attempting to login that the user's password has expired. To change the password, click on the "Change Password" hyperlink immediately below the Password box on the Login page.




From the **Change Password** page, enter the Username and Current Password. Enter the New Password, Confirm (*new*) Password and click the <Change Password> button.




Upon the successful completion of the password change, a message stating that the password was changed successfully will be displayed. Click on the <Login> button to return to the login page. Now you may login with your username and new password to begin using the Trust Online system.

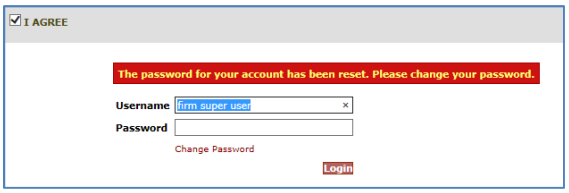



**Temporary Password**

As another added security measure, whenever an account's password has to be reset because it has become disabled due to incorrectly entering the password at least 3 times or the password has expired. A new temporary password will be issued that will allow the user access to update their password before logging into Trust Online.

When the user attempts to login with their temporary password, they will get a message stating that "The Password for your account has been reset. Please change

your password." This adds another layer of security, making sure that a new password is created which is known only to the specific user.



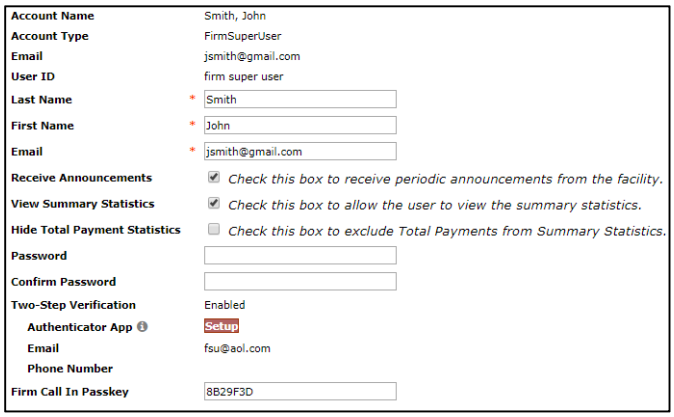

When the user gets this message, they will need to click the "Change Password" link in order to change their assigned temporary password. The system will require the user to add a strong password.

**Strong Password** – A strong password is a password that should not be easy to guess and would have a measure of effectiveness against brute-force attacks. There are several common guidelines on creating a strong password, but some of the most effective measures would include using lowercase and uppercased alphabetic characters, numbers and symbols.

## Firm Super User Profile

Trust Online provides account information for each user on their Profile page. The Firm Super User account type will be able to view the following account information including *Account Name, Account Type, Email Address, User ID, Last Name, First Name, Two-Step Email and Phone Number, Firm Call In Passkey* as well as the *Receive Announcements, View Summary Statistics*, and *Hide Total Payment Statistics* check boxes.

Except for *Account Type* and *User ID*, each user can also make changes to their information on their profile page.




The FSU's Profile page will also list all of the Attorneys that have submitted claims for Trust Online along with a snapshot of their current notification preferences.

From this page, the FSU can also view the firm's *Payment Options*, *Firm Payment Notifications* and set up the *Attorney Options*. The **Payment Options** and **Firm Payment Notifications** are read only fields and can only be changed by the Facility.

The **Attorney Options** includes setting up notifications preferences (paper or electronic) for the following:

- Offers
- eSignature Release
- Release Deficiencies
- Intake/Review Deficiencies
- Activities (Duplicate Claims, Prepetition, etc.)

## Payment Option

The Payment Option includes *Paper Check* or *Electronic Debits (ACH).* All firms are automatically set up as paper checks until a completed ACH form is submitted and processed by the Trust. A form will need to be submitted for each trust and can be found on the download page of each public trust website.

**Payment Options**

| Trust | Payment Type |
|---|---|
| B&W | Electronic |
| CEL | Electronic |

## Firm Payment Notifications

On the bottom of the ACH form, there is a section that authorizes an email to be sent as *notification of payment* to one or more Trust Online users. The email(s) entered in this section must have an active Trust Online account. Once the firm is set up for Electronic Debits, the FSU profile will display the "Enable Electronic Notifications" check box as selected and the users that are to be notified upon payment.

**Firm Payment Notifications**

☐ Include Acme Law in paper mailing.

☑ Enable Electronic Notification:

| Trust | Account |
|---|---|
| B&W | Smith, Joseph (jsmith@acmelaw.com) |
| CEL | Smith, Joseph (jsmith@acmelaw.com) |
| B&W | Smith, Robert (rsmith@aol.com) |
| CEL | Smith, Robert (rsmith@aol.com) |

Once the user is notified via email, they will need to log into Trust Online and proceed to the Notifications page to view/print the payment notification(s).

## Attorney Options

The Attorney Option can be set up by the FSU or the submitting attorney with an Attorney account. This view will provide information for each attorney in the firm and display their notification preferences.

**Attorney Options**

Save To File < 1 to 3 of 3 >

| Attorney Name | Activity Notifications | Intate/Review Deficiency Notifications | Release Deficiency Notifications | Offer Notifications |
|---|---|---|---|---|
| SMITH, JOHN | Electronic | Electronic | Electronic | Electronic |
| Smith, Robert | Electronic | Electronic | Electronic | Electronic |

To begin setting up the notification preferences, click on the attorney's name. This will re-direct the FSU to the attorney's profile page where he/she may begin setting the notifications preference for each option.

**Notification Options**

**Offer Notifications**

☐ Include Smith, Robert in paper mailing.

☑ Enable Electronic Notification:

| Trust | Account | |
|---|---|---|
| B&W | staffaccount1 (staff@firm) | ✕ |
| CEL | staffaccount1 (staff@firm) | ✕ |
| All | --- Select Account --- | |

**eSignature Release Notifications**

☑ Enable Electronic Notification:

| Trust | Account | |
|---|---|---|
| B&W | staffaccount1 (staff@firm) | ✕ |
| CEL | staffaccount1 (staff@firm) | ✕ |
| All | --- Select Account --- | |

**Release Deficiency Notifications**

☐ Include Smith, Robert in paper mailing.

☑ Enable Electronic Notification:

| Trust | Account | |
|---|---|---|
| B&W | staffaccount1 (staff@firm) | ✕ |
| CEL | staffaccount1 (staff@firm) | ✕ |
| All | --- Select Account --- | |

**Intake/Review Deficiency Notifications**

☐ Include Smith, Robert in paper mailing.

☑ Enable Electronic Notification:

| Trust | Account | |
|---|---|---|
| B&W | staffaccount1 (staff@firm) | ✕ |
| CEL | staffaccount1 (staff@firm) | ✕ |
| All | --- Select Account --- | |

**Activity Notifications (Duplicate Claims, Prepetition, etc.)**

☐ Include Smith, Robert in paper mailing.

☑ Enable Electronic Notification:

| Trust | Account | |
|---|---|---|
| B&W | staffaccount1 (staff@firm) | ✕ |
| CEL | staffaccount1 (staff@firm) | ✕ |
| All | --- Select Account --- | |

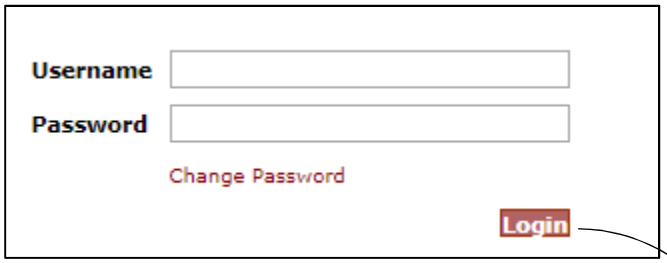
Save Cancel

# Chapter 2 Trust Online User Login

## Trust Online Two-Factor Authentication

In a continued effort to increase the Trust Online system security, the facility requires a Two-Factor Authentication (TFA) code for all firm users. This will be required for all staff and attorney accounts, as well as the Firm Super User.

This will provide a second layer of security (the password being the first) to Trust Online by requiring the user to verify a separate and unique verification code in addition to their password.



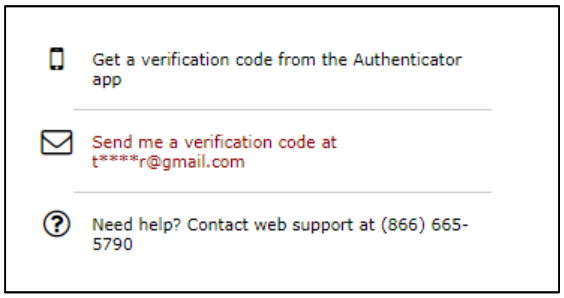

After successfully logging into Trust Online, the user will be directed to another page displaying the Verification code field. The user will have to enter the Verification code which is a time-based one-time password (TOTP) token that needs to be entered within a specific time period.

Since this verification code is only valid for a specific period of time, it may expire if not entered within that time. If the code does expires before entering it or if entered incorrectly, an error message will be displayed stating that the "**Two-Step Verification code is incorrect or has expired**". At this point, the user would have to request another verification code.

## The TFA Process – Requesting the Verification Code

Trust Online offers three options for requesting and receiving the TFA verification code. By default, when a user is first enabled for Two-Step Verification, the current email address associated with their account will be used to receive the email verification code (*See Image below*):

- TFA Authenticator App (the preferred method)
- Email (the default Option)
- Text Message (to a mobile device)




Users may also elect to have their Firm Super User update their profile with their mobile phone number, in order to retrieve verification codes via text messages. Unfortunately, neither text messages nor emails ("*SMS Tokens*") are the most

secured method of retrieving the verification code. Although users may choose any one of the three selections listed above, the preferred and most secured option is the TFA Authenticator App. We will discuss the advantages of using the Authenticator app in the next section.

## TFA Authenticator App over SMS

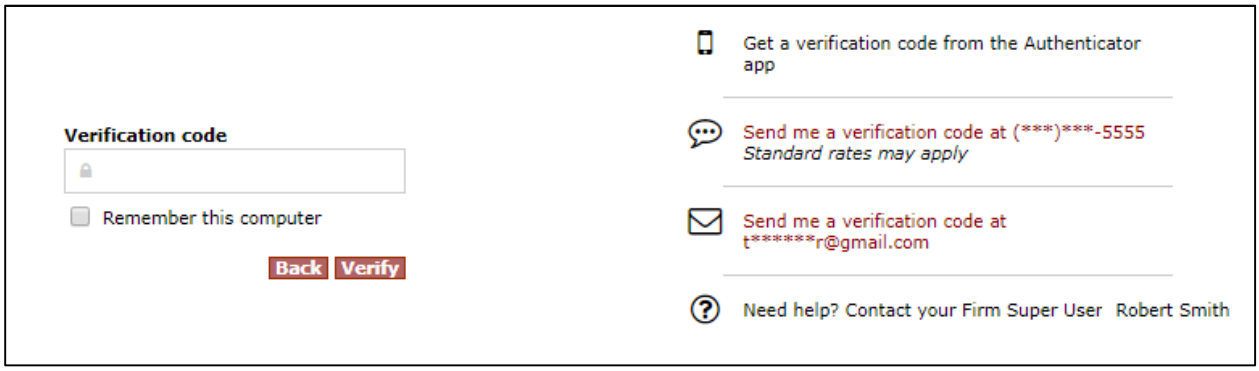
The primary drawback in receiving the verification code through email or text messages is that the code has to be sent from a server to your email or phone. Although, it's still more secure than just having a simple password, these methods do not correlate with the enhanced security measure necessary to protect the firm's claimant data at the highest levels.

In contrast to receiving the codes from a server, the TFA Authenticator app generates the verification code without needing an internet connection whatsoever and are always readily available to view from your mobile device. The TFA Authenticator App offers security to your firm's data that SMS tokens may not, therefore, we recommend downloading and using one of the following mobile apps:

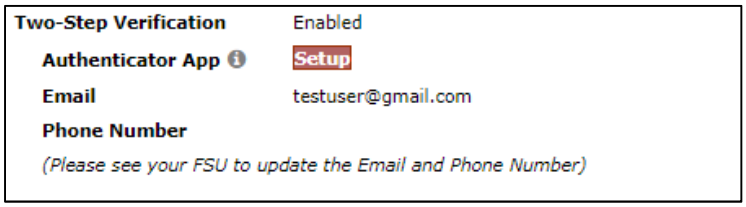
- Google Authenticator
- Microsoft Authenticator
- Duo Mobile

## Setting Up Authenticator App

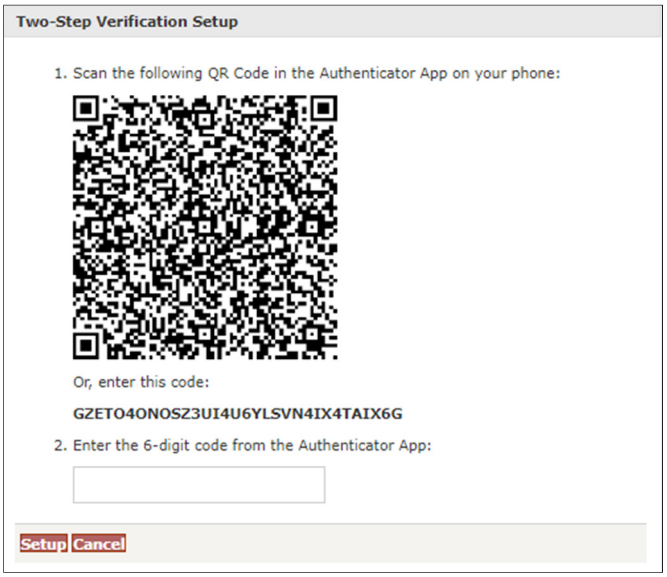
After your download is complete, you will need to set up your App to be in sync with your Trust Online account. The next time you log into Trust Online, you will still need to use the Email or Phone method to receive your initial verification code.



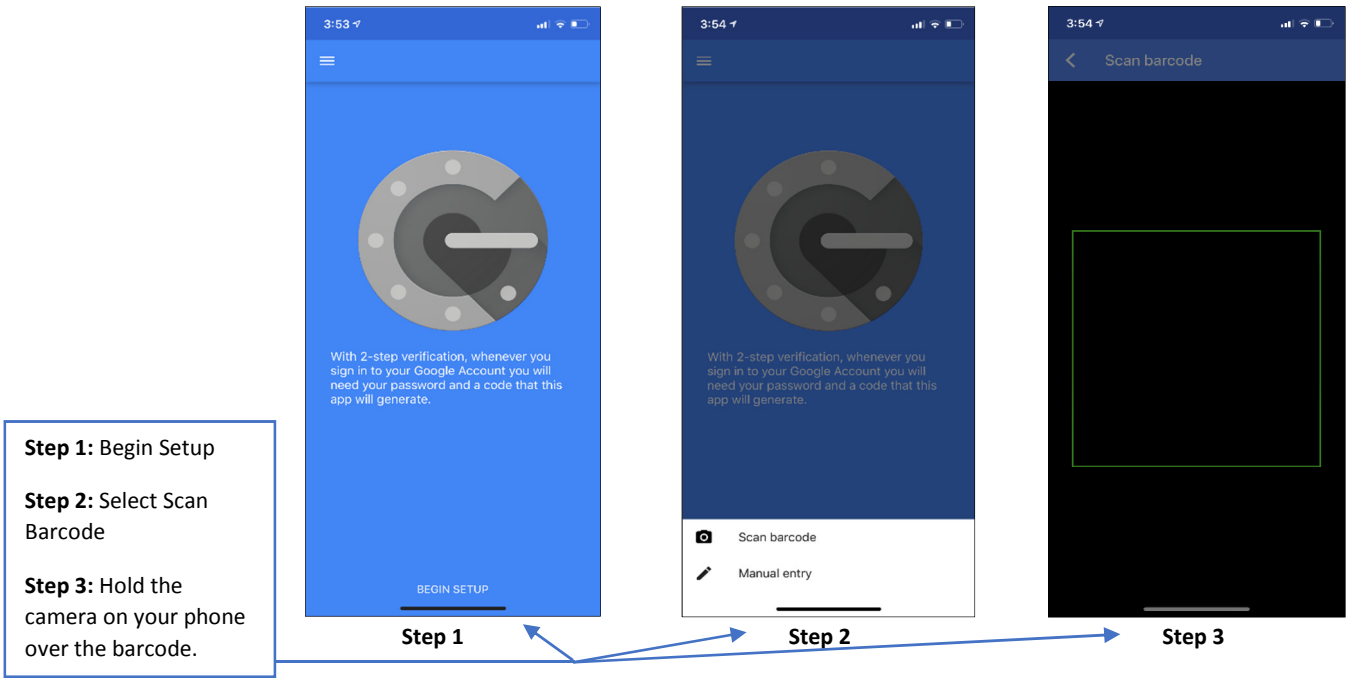

Once you are logged in, go to your Profile page and click on the Setup button to set-up the Authenticator App.

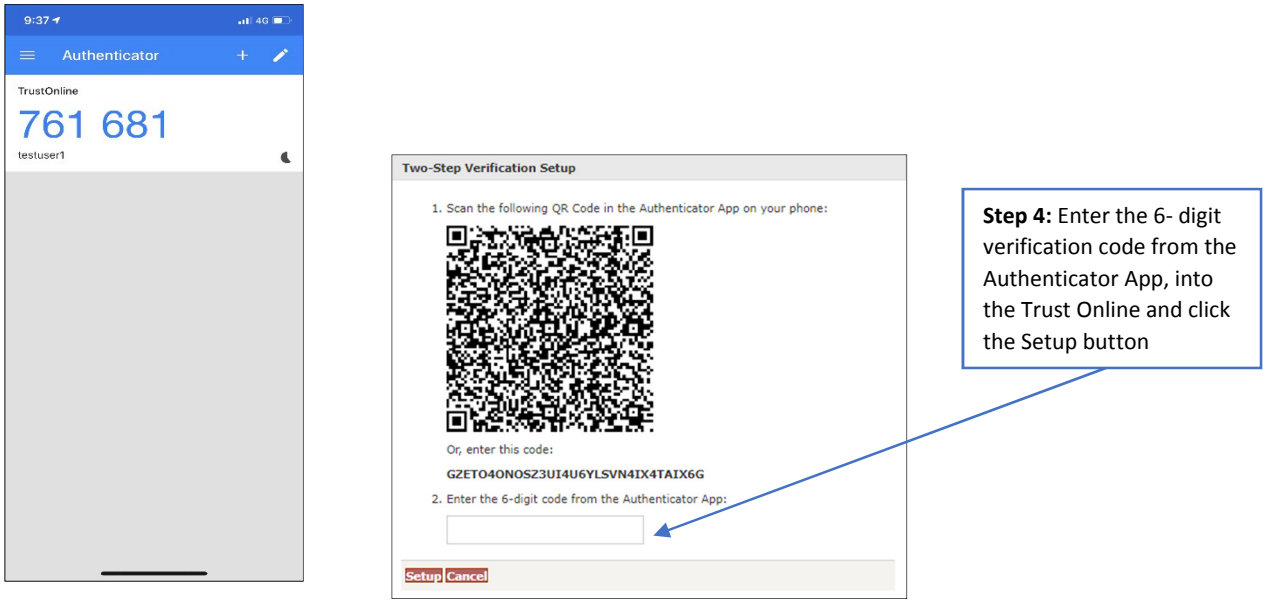


A barcode will appear in a pop-up window. You may scan this barcode using your mobile device's camera or manually enter the 32-digit code to complete the TFA mobile setup.




The following steps demonstrate how to connect the Google Authenticator app to your Trust Online account. The Microsoft and Duo Mobile apps have similar steps.

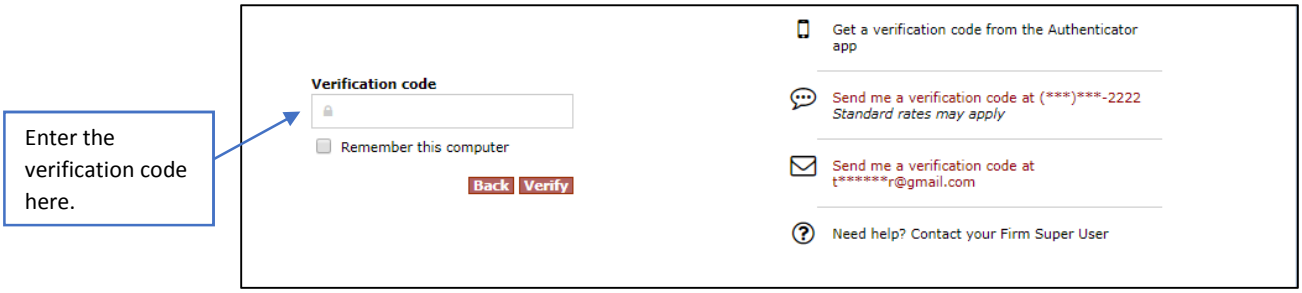





**Step 4**

Once setup is complete, you will need to enter the verification code from the Authenticator App each time you log in to Trust Online unless the Remember this computer box is selected prior to clicking the Verify button.

*Note: The verification codes change every thirty seconds in the App. You will need to enter the code that is currently displayed on your Authenticator App in order to log in.*

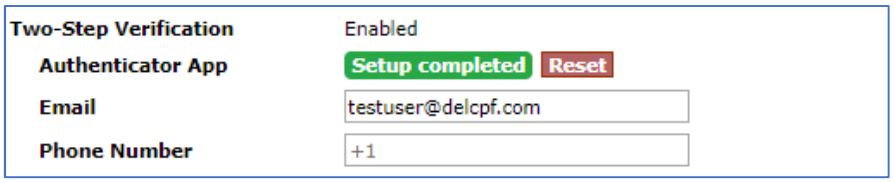



- Remember this Computer

  The "Remember this computer" checkbox allows your browser to remember the current computer setup (i.e. Username, IP Address) so that the Verification code will only have to be entered in every 30 days. Whenever this user attempts to log into Trust Online from another computer with a different IP Address, a new Verification code will need to be re-entered. *Note: If your current browser set up deletes the browser cookies upon shutdown or at regular intervals, Trust Online will prompt the user to enter in a new Verification code upon logging back into Trust Online.*

- Email & Text Message Setup

  Your TFA email address will be set to your current Trust Online email address by default, when your account is enabled for TFA by the facility. If you would like to receive verification codes via text message, your mobile phone number will need to be added by the Firm Super User. Any updates to email or mobile phone numbers will need to be made by the Firm Super User.

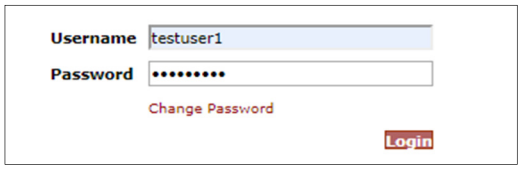



**User Account Profile (Firm Super User View)**

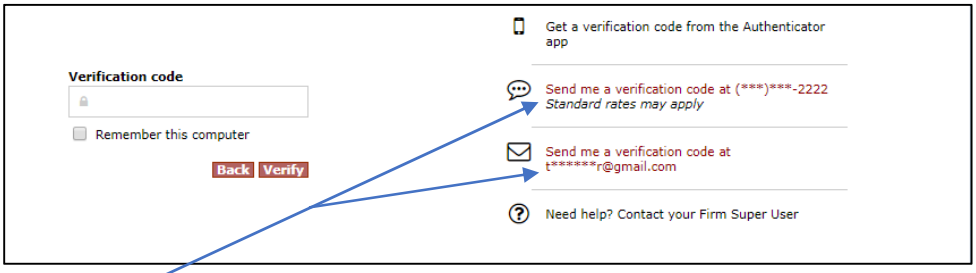
- Signing onto Trust Online

  Once you are set-up to receive verification codes via email, text message or Authenticator app, the system will ask you to select your preferred delivery method (i.e., email, phone) or you may simply enter the code from the Authenticator app each time you log in with your password. Of course, if you have checked the Remember this computer checkbox, you'll only need to enter the code once every 30 days.

  *Note: The verification code is valid for two minutes after receipt. If you fail to login within that time frame, you will be required to request another verification code.*

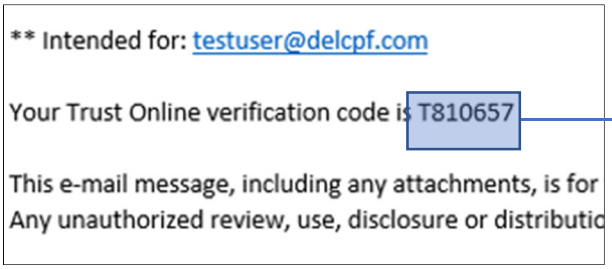



**Step 1**



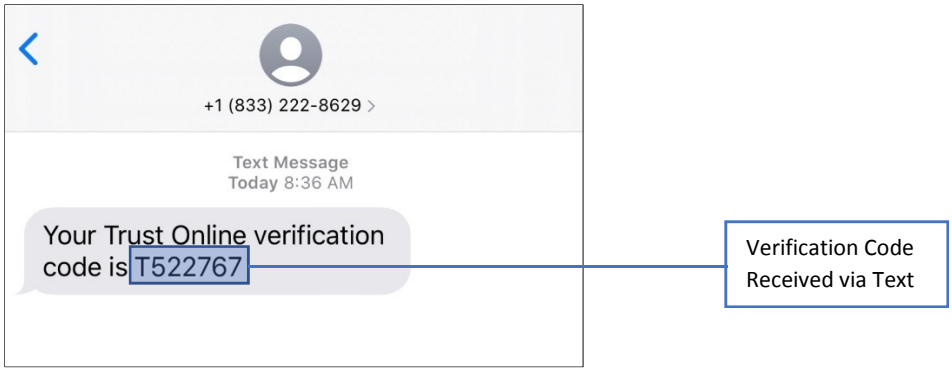

**Step 2**

Click on one of the links to receive a verification code through the corresponding delivery method.




Verification Code Received via Email

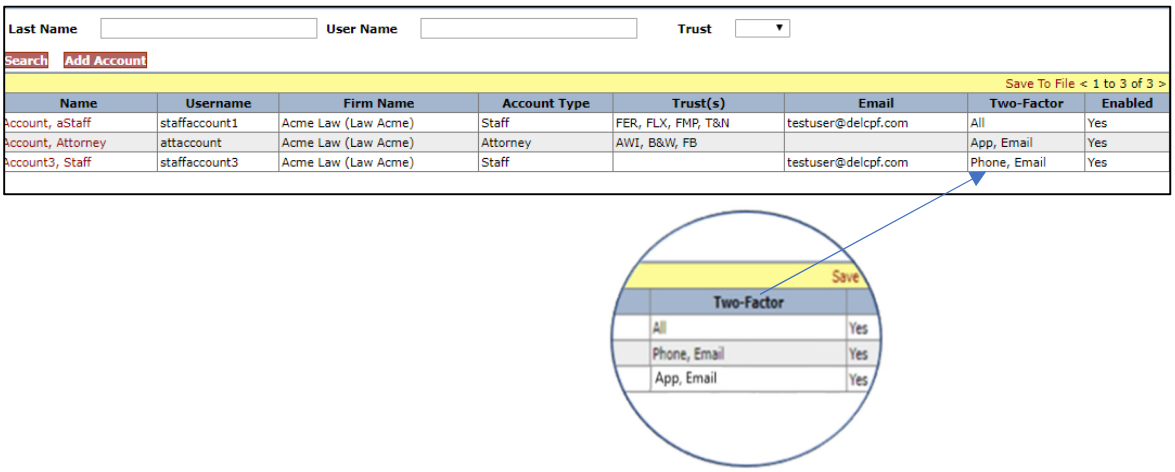
**Verification Email**




**Verification Text Message**

❖ User Accounts Page

The User Accounts page has been updated to include a Two-Factor column. This allows Firm Super Users to quickly sort their list of accounts by the type of Two-Factor verification options each user has (App, Phone, Email, All, or None)




| Name | Username | Firm Name | Account Type | Trust(s) | Email | Two-Factor | Enabled |
|---|---|---|---|---|---|---|---|
| Account, aStaff | staffaccount1 | Acme Law (Law Acme) | Staff | FER, FLX, FMP, T&N | testuser@delcpf.com | All | Yes |
| Account, Attorney | attaccount | Acme Law (Law Acme) | Attorney | AWI, B&W, FB | | App, Email | Yes |
| Account3, Staff | staffaccount3 | Acme Law (Law Acme) | Staff | | testuser@delcpf.com | Phone, Email | Yes |

❖ Two-Step Verification Edits

After setup is complete, if necessary, the Firm Super User will be able to update the TFA Email or TFA Phone Number. If for any reason the Authenticator App stops working or doesn't work correctly, the FSU can reset the Authenticator App by clicking on the Reset button. This will remove the user from the App and they will need to go through the whole process of setting up their Authenticator App.

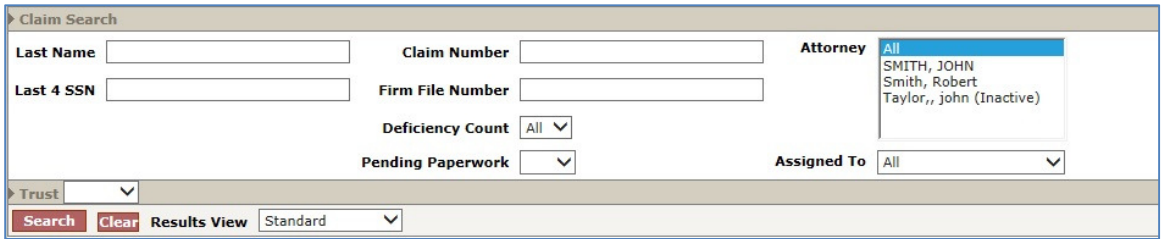
# Chapter 3 Trust Online User Functions

## Claim Search

For most users, the aim Search page will be the hub of the entire site. From this page, users will be able to search for a *specific claim*, *list of claims* and/or *download customized report*.

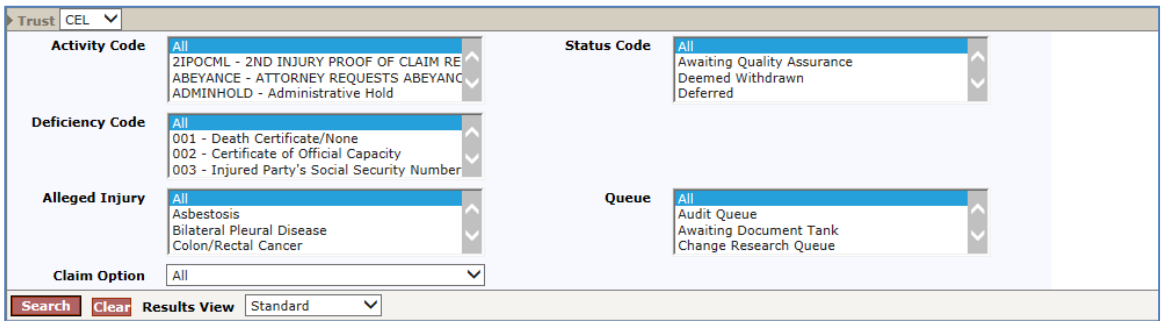
This page is broken down into two sections, *Claim Search* and *Trust*. At the top of the page is the *Claim Search* section which allows the user to search for claims using only the following criteria; **Last Name, Last 4 SSN**, **Claim Number**, **Firm File Number**, **Deficiency Count**, **Pending Paperwork, Attorney** and **Assigned To**.

In this section, using the *Claim Number* is generally all you would need to find your claim. However, if the *Claim Number* is missing, it would be advisable to enter as much information as possible to filter your search results.



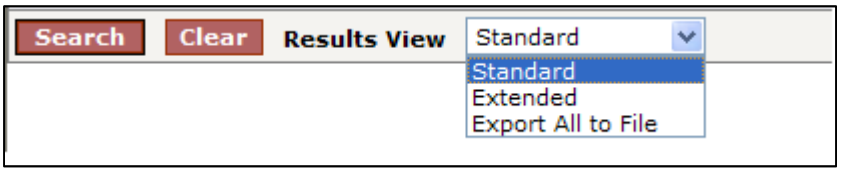

For more search criteria, you may also use the **Trust** section of the claims search page in conjunction with the **Claim Search** section.

At the bottom of the page is the Trust search section which allows the user to search for claims using the additional following criteria; **Trust, Activity Code**, **Deficiency Code**, **Alleged Injury**, **Claim Option**, **Status Code** and **Queue**.

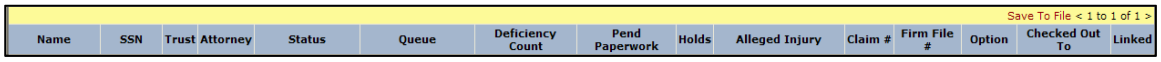



After entering all of the specified criteria, click the **<Search>** button to begin searching for the claim or listing of claims. The **Results View** drop-down box found next to the **<Clear>** button will allow the user to view more or less information depending upon the required information needed.

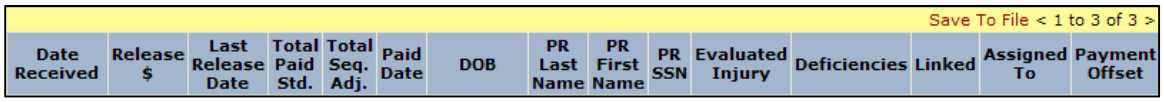
## Search Results



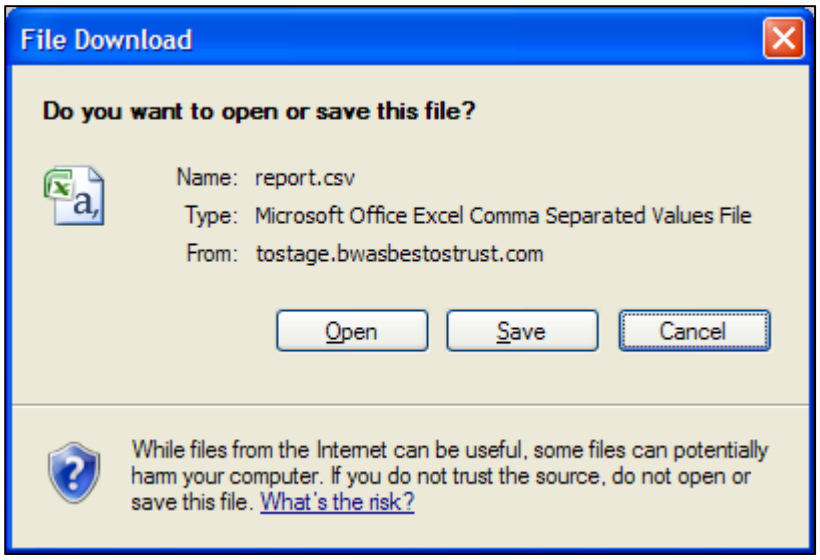

The **Results View** defaults to "**Standard"** and will provide the most basic claim information including *Name*, *SSN (Last 4 SSN)*, *Trust*, *Attorney*, *Status*, *Queue*, *Deficiency Count*, *Pend Paperwork*, *Holds*, *Alleged Injury*, *Claim #, Firm File #, Option*, *Checked Out to* and *Linked*.




To view more information in your search results, click on the Results View drop-down and select the "**Extended"** view. This will provide all of the basic claim information found in the "**Standard"** results view and additional information including *Date Received*, *Release Amount*, *Last Release Date*, *Total Paid Std.*, *Total Seq. Adj.*, *Paid Date*, *DOB*, *PR Last Name*, *PR First Name*, *PR SSN (Last 4 SSN)*, *Evaluated Injury*, *Deficiencies, Assigned To* and *Payment Offset*.




To export all of the data found in the "**Extended**" view to an excel spreadsheet, select the "**Export All to File**" from the drop-down and click the **<Search>** button. A File Download box will appear prompting the user to Open, Save or Cancel.



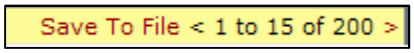

This file will be opened or saved as a "**.csv**" file. To save the file as an excel spreadsheet, with the file opened, click "**Save As**" and select "**Excel Workbook**". The newly saved file will now display the correct excel file extension, **(.xls)**.

## Downloading Results

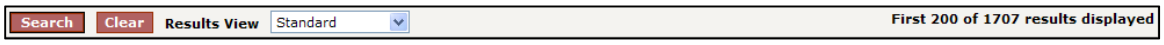
Similar to the "**Export All to File**" option mentioned in the previous section, the user may also be able to download the data by clicking on the "**Save To File**" link located on the right hand side of the results grid.

The results grid only displays the first 15 of the maximum 200 claims that can be viewed. To page through the 200 claims, click on the greater than sign (**>**) to view the next 15 claims or the less than sign (**<**) to view the previous 15 claims.

The "**Save To File**" link will export the maximum viewable 200 claims to a spreadsheet.

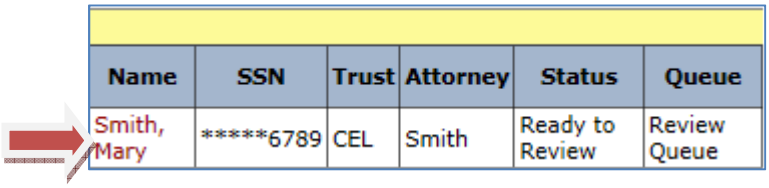



For searches that result in greater than 200 claims, select "**Export All to File**" to export the claim data to an excel spreadsheet.




# The Claim

To view and/or edit claims, search for the claim using the procedures mentioned in the previous section. From the results grid, click on the Name displayed in the red font.



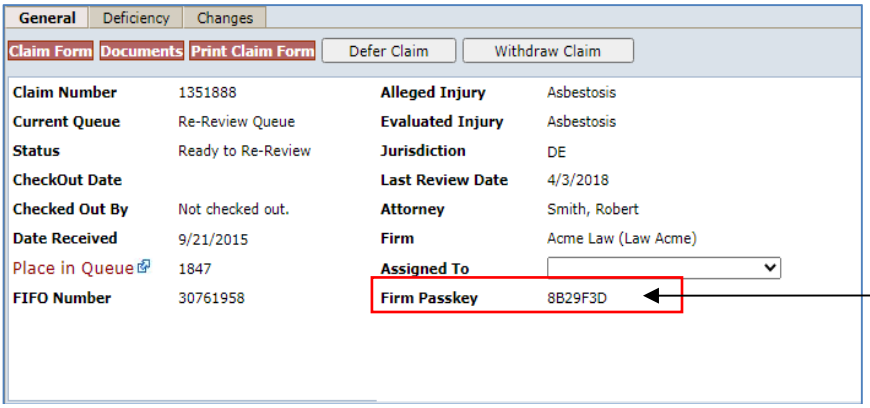
| Name | SSN | Trust | Attorney | Status | Queue |
|---|---|---|---|---|---|
| Smith, Mary | *****6789 | CEL | Smith | Ready to Review | Review Queue |

After clicking on the Name, a new window will open displaying the claimant's general information. The general information is listed under the **General** tab and will always be the first page displayed. There are two other tabs: **Deficiency** and **Changes**.

## General Tab

The **General** page provides a summary of the claim. The information listed on this page include: *Claim Number*, *Current Queue*, *Status*, *Checked Out Date*, *Checked Out By*, *Date Received, Place in Queue*, *FIFO Number, Alleged Injury*, *Evaluated Injury*, *Jurisdiction*, *Last Review Date*, *Attorney*, *Firm, Assigned To* and *Firm Passkey*.

In addition to this information, the page also provides the user with a number of buttons that provide several functions.




Below is a brief description of the buttons and their functions:

| Button Name | Functions |
|---|---|
| Claim Form | Redirects user to the Representation page of the claim form to begin editing claim data. |
| Documents | Redirects user to the Documents page of the claim form to review the documents uploaded to the claim, or to begin uploading additional documents |
| Print Claim Form | Opens the claim form in a PDF format to view or print. |
| Defer Claim | Places the claim in a Deferred status. Once the button is clicked, the **<Undefer Claim>** button will be displayed. |
| Withdraw Claim | Places the claim in a Withdrawn status. |

The "**Place In Queue**" label also functions as a hyperlink to a new window which displays the weekly average for both Initial and Re-Review for each Trust.

| Celotex Weekly Average | | |
|---|---|---|
| Date Updated | Initial Review | Re-review |
| 10/1/2020 | 146 | 385 |

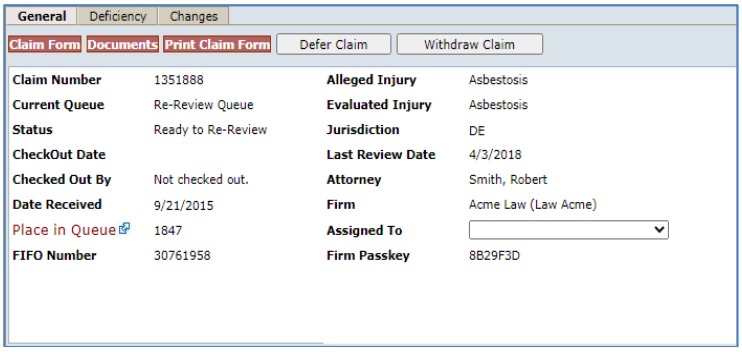
The **Firm Passkey** is an added security feature which has been implemented to protect the confidentiality of your firm's claim inventory. This passkey is provided for firms that call in to the Facility for claim information and can be located on the General Page of each claim. All Firms *must* provide the Facility with this Passkey whenever inquiring about any claim information, such as the status of the claim or questions about specific deficiency codes.

Only one **Passkey** is assigned to each firm and this passkey can only be *edited* by the Firm Super User, on their profile page. **Editing** this field in the profile page will change the Firm Passkey for the entire firm. The passkey must be at least 7 characters long and contain at least 1 letter and 1 number.

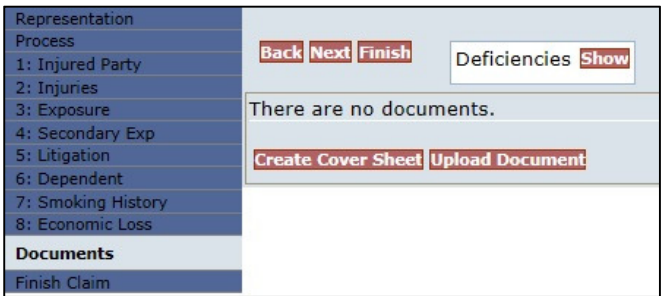
## Documents

## Documents Submission

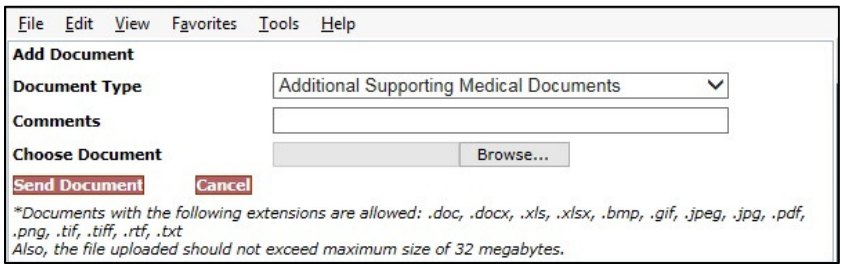
To upload documents on Trust Online, the user may click on the Documents button on the claim's General Tab or the Claim Form button and then click the Documents tab.




By clicking the Documents button, the user will be directed to the Documents page of the electronic claim form. Next click the Edit button in order to display the two buttons that are used to submit documents electronically – Create Cover Sheet, Upload Document.




Use the **Upload Documents** button to submit documents that have been scanned and stored in an electronic format. From the image below, select the Document Type and Choose Documents by clicking the Browse button and finding the stored documents. Click the **Send Document** button in order to complete the upload process.




Documents that exceed a size of 32 megabytes will not be uploaded and an error message will be displayed advising the user of the size of the document that exceed the maximum size. User will also receive an error message when attempting to upload document types that do not have the extensions listed in the above image.

After uploading the documents, a document grid will display the newly uploaded documents. This grid will display for each document uploaded a *Document ID, Document Type, Comment, Received* (date), *Edited By, Edited, Created By*, and *Created* (date). The last field displays icons for editing the document record (pencil), printing a fax cover sheet (printer) and re-uploading documents (arrow).

Save To File < 1 to 3 of 3 >

| Document ID | Document Type | Comment | Received | Edited By | Edited | Created By | Created | |
|---|---|---|---|---|---|---|---|---|
| 10249565 | Chest X-Ray/B-Reader Report | This is the chest x-ray | | firm super user | 1/31/2019 | firm super user | 1/31/2019 | |
| 10249564 | Physical Exam | This is the physical exam | | firm super user | 1/31/2019 | firm super user | 1/31/2019 | |
| 10249563 | Additional Supporting Medical Documents | | | firm super user | 1/31/2019 | firm super user | 1/31/2019 | |

Proceed to the finish page and click the Submit Claim button in order to submit the newly uploaded documents. Until these documents are submitted, the Received (date) field will remain empty and the documents will not be received by the claim.

## Viewing/Downloading Documents

After the documents are received, a date will be displayed in the Received field and the Document ID will become a hyperlink which allows the users to open and view the uploaded document. Click on the Document ID to open and view the documents in a browser window.

Save To File < 1 to 3 of 3 >

| Document ID | Document Type | Comment | Received | Edited By | Edited | Created By | Created | |
|---|---|---|---|---|---|---|---|---|
| 10249565 | Chest X-Ray/B-Reader Report | This is the chest x-ray | 1/31/2019 | firm super user | 1/31/2019 | firm super user | 1/31/2019 | |
| 10249564 | Physical Exam | This is the physical exam | 1/31/2019 | firm super user | 1/31/2019 | firm super user | 1/31/2019 | |
| 10249563 | Additional Supporting Medical Documents | | 1/31/2019 | firm super user | 1/31/2019 | firm super user | 1/31/2019 | |

## Claim Document Download Threshold

In order to protect the personal information of claimants, a Claim Document Download Threshold has been implemented which limits the number of documents that can be viewed or downloaded by any user. Every user within a firm will have their own separate download limit, which will not affect any other user from downloading documents even when one of the users has reached their limit.

As the user approaches their download limit, a warning message will be briefly displayed with each subsequent document viewed.

Warning: You are about to exceed the allowed number of document views per hour. Please contact Websupport at 866.665.5790 with any questions.

Once the limit has been reached, the user will be prohibited from viewing or downloading any claim documents until the conclusion of the one-hour period. During this period, every attempt to view or download a document will result in an alert that states the limit has been exceeded.

**Alert**

Document cannot be downloaded because the download limit per hour has been exceeded. Please contact Websupport at 866.665.5790 with any questions.

Once this threshold has been exceeded, the firm user can contact websupport (if necessary) to override the document download limit in order to complete a time sensitive task.

## Archived Documents

As an added security measure, direct access to certain claim documents have been restricted. These documents have been archived on claims that are considered inactive. Claims that fit this description would be claims that:

- Have been Paid or Withdrawn for more than 2 years, or;
- Have been on Hold, such as Prepetition or Sol claims, for more than 2 years.

Claim documents are archived. Please contact web support to view the documents.

Save To File < 1 to 5 of 5 >

| Document ID | Document Type | Comment | Received | Edited By | Edited | Created By | Created | |
|---|---|---|---|---|---|---|---|---|
| 10239202 | Conversion Summary | Source Trust Review Results | 7/20/2017 | acme2 | 7/20/2017 | acme2 | 7/20/2017 | |
| 10231138 | Chest X-Ray/B-Reader Report | | 10/25/2016 | ctaylor | 10/25/2016 | ctaylor | 10/25/2016 | |
| 10231129 | PFT Result | | 10/25/2016 | ctaylor | 10/25/2016 | ctaylor | 10/25/2016 | |
| 10231128 | Chest X-Ray/B-Reader Report | | 10/25/2016 | ctaylor | 10/25/2016 | ctaylor | 10/25/2016 | |
| 10231127 | Physical Exam | | 10/25/2016 | ctaylor | 10/25/2016 | ctaylor | 10/25/2016 | |

When attempting to view the document, the user will see a new message that states that the "Claim documents are archived. Please contact web support to view the document". On these claims, the Document ID will no longer work as a hyperlink until the documents are restored.

To request that the documents be restored on these claims, contact websupport. As soon as the document restoration process is started for the claim, an asterisk will appear next to the documents being restored.

Save To File < 1 to 5 of 5 >

| Document ID | Document Type | Comment | Received | Edited By | Edited | Created By | Created | |
|---|---|---|---|---|---|---|---|---|
| 10239202 * | Conversion Summary | Source Trust Review Results | 7/20/2017 | acme2 | 7/20/2017 | acme2 | 7/20/2017 | |
| 10231138 | Chest X-Ray/B-Reader Report | | 10/25/2016 | ctaylor | 10/25/2016 | ctaylor | 10/25/2016 | |
| 10231129 | PFT Result | | 10/25/2016 | ctaylor | 10/25/2016 | ctaylor | 10/25/2016 | |
| 10231128 | Chest X-Ray/B-Reader Report | | 10/25/2016 | ctaylor | 10/25/2016 | ctaylor | 10/25/2016 | |
| 10231127 | Physical Exam | | 10/25/2016 | ctaylor | 10/25/2016 | ctaylor | 10/25/2016 | |

* Indicates that the document is being restored, but is currently unavailable.

## Releases & Payments Grid

Once a claim is review approved and sent to the Release Queue, a release offer is created. Claims with a newly created release will have a status of Offer Issued and be placed in the Offer Issued Queue. On the General Tab of these Offer Issued claims, a Releases grid will be displayed providing the user with the following information: Release Date, Gross Value, Offset, Amount, Original Pmt%, Current Pmt% and Active.

**Releases**

Save To File < 1 to 1 of 1 >

| Release Date | Gross Value | Offset | Amount | Original Pmt % | Current Pmt % | Active |
|---|---|---|---|---|---|---|
| 4/3/2018 | $40,473.36 | $0.00 | $40,473.36 | 7.70 % | 7.70 % | Yes |

*Offer Issued*

On the Releases grid, the Release Date field acts as a hyperlink that will provide the user with the active release in order to view or download for printing. The Release Date hyperlink will be available to the user as long as the release has not been verified for payment and is currently active.

For example, once the claim receives a status of Release Verified and is placed in the Payment Queue, the Date will no longer act as a hyperlink and the firm will no longer have access to the release from the General Tab. Users can always download the Releases from their Notifications page if one is needed.

**Releases**

Save To File < 1 to 1 of 1 >

| Release Date | Gross Value | Offset | Amount | Original Pmt % | Current Pmt % | Active |
|---|---|---|---|---|---|---|
| 4/3/2018 | $40,473.36 | $0.00 | $40,473.36 | 7.70 % | 7.70 % | Yes |

*Release Verified*

Once a release has been verified for payment, the claim will be queued up for payment. Once a payment is generated, the claim will have a Paid status and be placed in the Payment Issued Tank. On the General Tab of these Paid Claims, a new Payments grid will also be displayed providing the user with the following information: *Payment Date, Payment Amount* and *Payment Type*.

**Payments**

Save To File < 1 to 1 of 1 >

| Payment Date | Payment Amount | Payment Type |
|---|---|---|
| 4/3/2018 | $3,116.45 | Standard Payment |

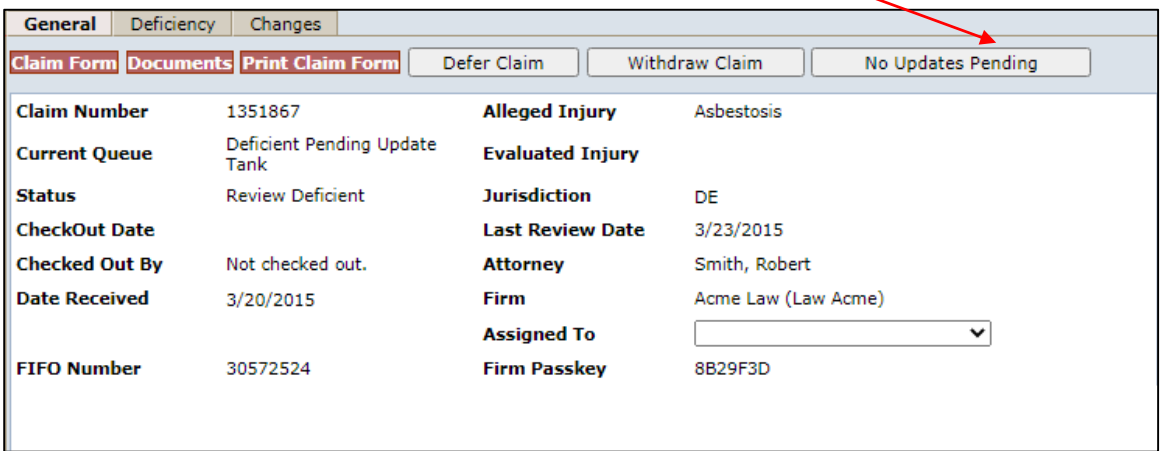
*Paid Claim*

**Updates Pending**

Once claims have been Reviewed and placed in the *Deficient Tank*, the firms must provide additional claim information to clear the deficiencies. Once a claim is updated, the claim will immediately enter the *Deficiency Response Queue* and may be sent to the Re-Review Queue if all deficiencies have been responded to even though the firm may not have updated the claim entirely.

In order to hold the claim from being Re-reviewed until the claim has been updated with all information, the firm may click the **<Updates Pending>** button.

A message box will appear confirming that you want to mark this claim as Updates Pending. Click OK to continue. This will place the claim in the *Deficient Pending Update Tank* and a new button labeled **<No Updates Pending>** will replace the **<Updates Pending>** button.




Once the firm has provided the claim with all information, they can release the claim by clicking on the **<No Updates Pending>** button. This will allow the claim to go to the Deficiency Response Queue and into the Re-Review process.

## Deficiency Tab

The **Deficiency** page provides a summary of all **Release** and **Standard** deficiencies that currently apply to the claim and each section provides the following information: *Deficiency Code*, *Description*, *Deficiency Date*, *Notification Date*, *Date Closed*, *Source*, *Status*, and *Last Edit*.

Both of these types of deficiencies should never exist on the claim at the same time and once they are cured, they are removed from the claim.

The **Standard** deficiencies are applied to the claim during the *intake* and *review process*.

- **Intake Deficiency** codes are applied to the claim during the initial claim submission when the claim is missing basic information, such as a Social Security number or an alleged injury. These types of deficiencies can be cleared by adding the missing claim information.

- **Review Deficiency** codes are applied to the claim during the review process when the claim is missing information required by the Trust to confirm it either medically or for exposure, such as an acceptable diagnosis or missing company exposure. These types of deficiencies can also be cleared by adding the missing claim information or uploading new documents.

General | **Deficiency** | Changes

**Release Deficiencies**
There are no items.

**Standard Deficiencies**

Save To File < 1 to 6 of 6 >

| Deficiency Code | Description | Deficiency Date | Notification Date | Date Closed | Source | Status | Pending | Last Edit |
|---|---|---|---|---|---|---|---|---|
| 003 | Injured Party's Social Security Number | 4/3/2018 | none | none | CEL | Accepted | | 4/3/2018 |
| 004 | Injured Party's Date of Birth | 4/3/2018 | none | none | CEL | Accepted | | 4/3/2018 |
| 007 | Date of Alleged Diagnosis | 4/3/2018 | none | none | CEL | Accepted | | 4/3/2018 |
| 009 | No First or Last Dates of Exposure Alleged | 4/3/2018 | none | none | CEL | Accepted | | 4/3/2018 |
| 010 | No Industry and/or Occupation | 4/3/2018 | none | none | CEL | Accepted | | 4/3/2018 |
| 014 | Attachments Missing | 4/3/2018 | none | none | CEL | Accepted | | 4/3/2018 |

*Intake Deficiencies*

The **Release** deficiencies are applied to the claim during the *release verify process* when a returned or uploaded release is missing basic information, such as required signatures or personal representative documentation.

General | **Deficiency** | Changes

**Release Deficiencies**

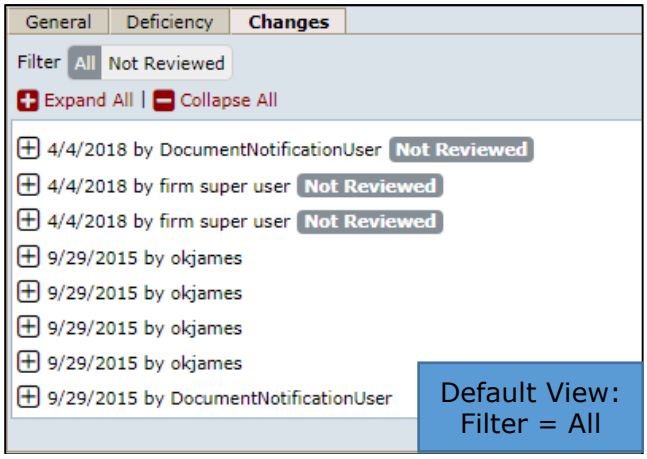
Save To File < 1 to 2 of 2 >

| Deficiency Code | Description | Deficiency Date | Notification Date | Date Closed | Source | Status | Pending | Last Edit |
|---|---|---|---|---|---|---|---|---|
| A01 | No Power of Attorney | 10/29/2020 | none | none | CEL | Accepted | | 10/29/2020 |
| B04 | No Death Certificate | 10/29/2020 | none | none | CEL | Accepted | | 10/29/2020 |

*Release Deficiencies*

## Changes Tab

The **Changes** tab provides the user with a list of all of the edits that have ever been made to the claim. In the default view, seen below, edits will be automatically sorted by the most recent changes made to the claim. The user also has the option of selecting the "**Not Reviewed**" filter option. This view will only display the changes that have not yet been reviewed. In this view, as in the image below, only the top 3 most recent changes would be displayed.

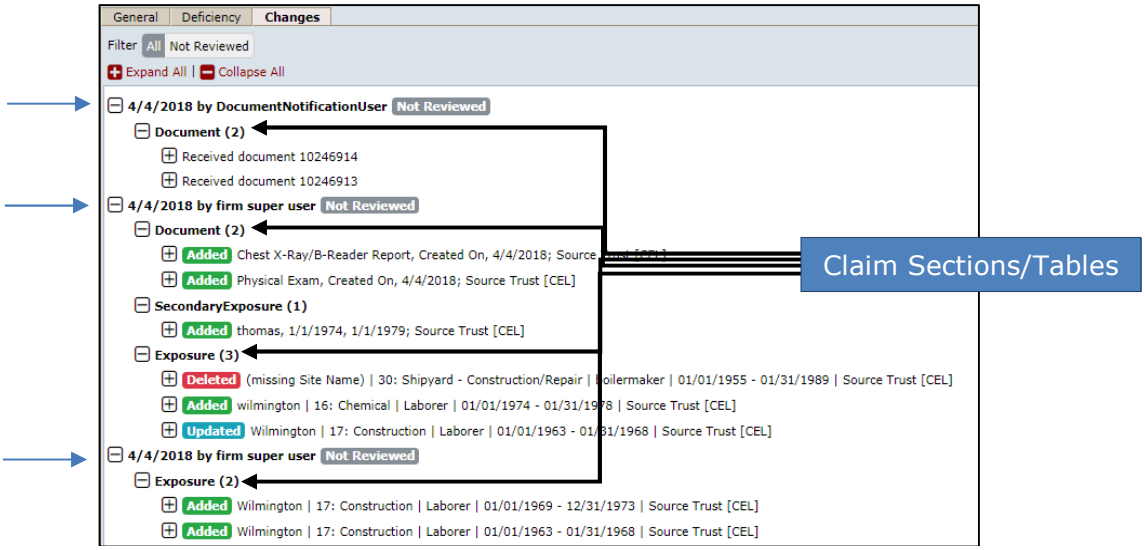



Each row in the Changes Tab displays all edits that have been submitted. When you see changes record with the same date, this doesn't necessarily mean that they were actually submitted at the same time. For example, in the image above, you'll notice that there were 3 edits done on 4/4/2018, but each of these edits were done and submitted at different times during this date. The most recent changes will always be displayed at the top of this page.

Each change record is identified by the date the edits were made, the username of the editor and in cases where the edits weren't reviewed, a flag labeled "**Not Reviewed**".

- **Filter** – The Filter button allows the user to choose between **'All'** or **'Not Reviewed'** changes. When the page is first displayed, **'All'** will be selected and all the changes that have ever been made to the claim will be displayed. To only view the changes that have not yet been reviewed select the 'Not Reviewed' button. This will filter out all other changes that have already been reviewed.

- **Expand All | Collapse All** – Immediately below the Filter buttons section are the **'Expand All'** and **'Collapse All'** buttons. By default, all of the Edits are in the Collapse View and only the identifying information is displayed for each edit. When clicking the **Expand All** plus button, the user will see all of the change details for all of the edits listed, grouped by the claim section. To collapse the change details for all of the edits click on **Collapse All**, which will return the user back to the default view.

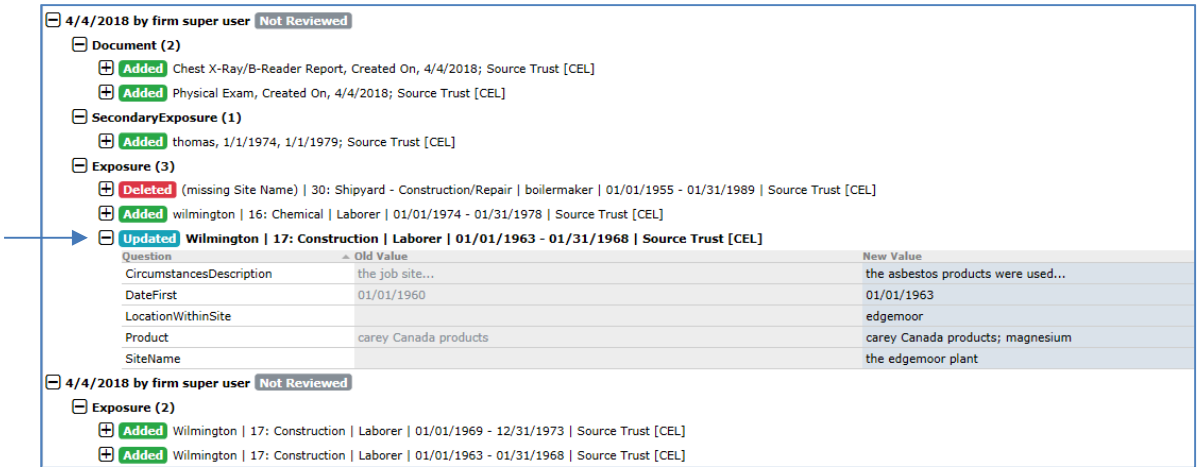



When viewing the Changes Tab in the default view, the user may choose to only expand the individual edits by clicking the plus symbol for the corresponding edits. For example, in the image above, if the user wants to view the changes that have not yet been reviewed, they may click on the plus symbol next to the April 4th date. This will expand those edits to display each section of the claim that was edited on those dates. *(See image above)*

From this view, the user will see the name of the claim section that was edited such as Document, Exposure, Secondary Exposure, etc., and the number of edits to the particular section displayed in parenthesis. For example, in the above image, the most recent edit shows that the Document section of the claim form had 2 documents added. The Corresponding Table names will be listed in place of the actual Claim Section, so the table below should help identify the more difficult to determine table names.

| Claim Section | Corresponding Tables |
|---|---|
| **Representation** | Exposed |
| **Process** | Exposed |
| **Injured Party** | Exposed |
| **Injuries** | Exposed |
| **Dependent** | Dependent |
| **Occupation Exposure** | Exposure |
| **Secondary Exposure** | SecondaryExposure |
| **Smoking History** | Exposed |
| **Litigation** | Litigation |
| **Disability** | Exposed |
| **Employment** | Exposed |
| **Documents** | Document |
| **Finish Claim (Comments)** | Exposed |

Below the claims section that was edited, the user will also see the individual edits listed which will be preceded with a colored label that describes the action taken. The user can click on the plus symbol that precedes the color label to view the fields that were updated.

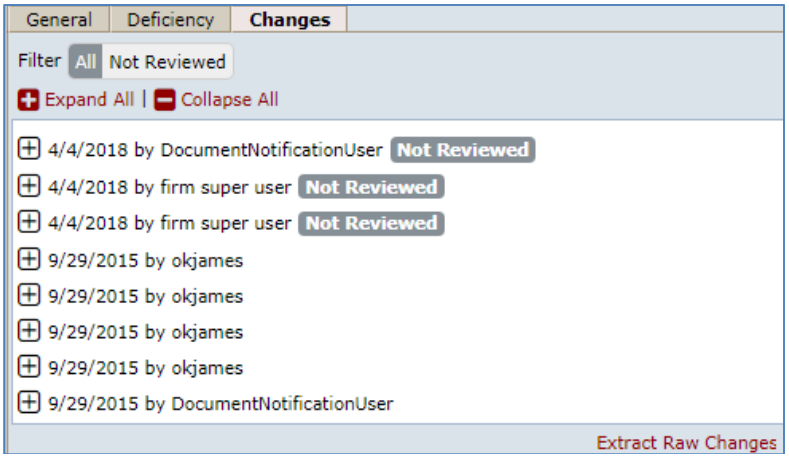



For example, the user can click on the plus symbol preceding the blue "Updated" label to view the details of the edited exposure record. In the example above, only the fields edited are displayed. From this expanded view, the user will see 3 columns – Question, Old Value and New Value. The first column list the name of the fields edited, while the Old Value display the value prior to the change and the New Value display the value after the changes. Below are listed the different labels and a brief description of each.

- **Added** – this label with the green background indicates that a new record has been added. This will be seen on parts of the claim form that allows for multiple records which are the Documents, Exposure, Secondary Exposure, Litigation and Dependents sections.

- **Updated** – this label with the blue background indicates that an existing record has been updated with new information. This will be seen on all parts of the claim form except for the Document's section which can't be updated.

- **Deleted** – this label with the red background indicates that a multi record section has been deleted. This will only be seen on parts of the claim form that allows for multiple records which are the Exposure, Secondary Exposure, Litigation and Dependents section. Documents can't be deleted from the claim form therefore this will not apply to this section.



There is also an Extract Raw Changes link that when clicked produces an Excel spreadsheet with all of the change details sorted by the most recent changes. The spreadsheet will list the following information: *Version, TableName, IdInfo, ColumnName, OldValue, NewValue, UserName, ChangeDate, Reviewed* and *UniqueId*.

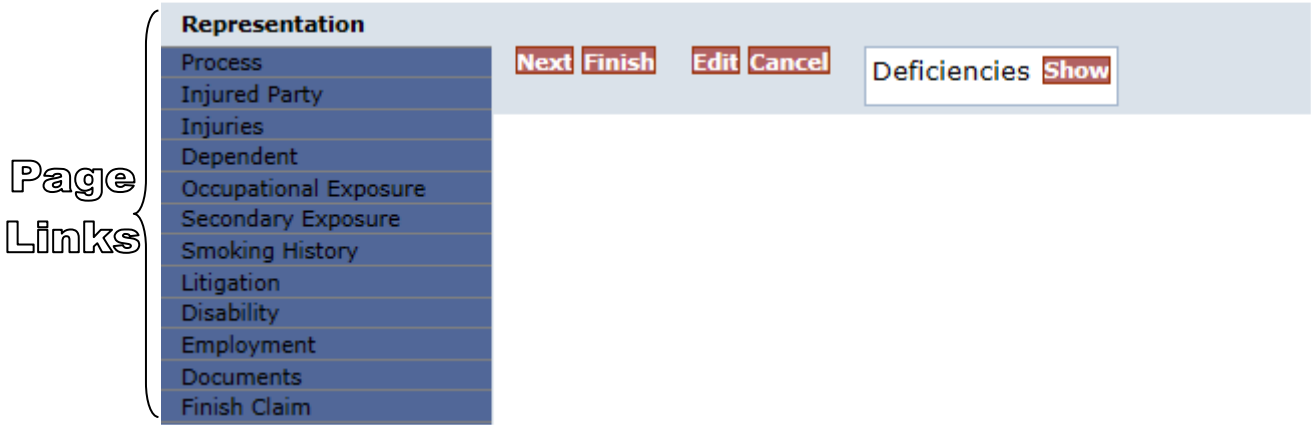
| | A | B | C | D | E | F | G | H | I | J |
|---|---|---|---|---|---|---|---|---|---|---|
| 1 | Version | TableName | IdInfo | ColumnName | OldValue | NewValue | UserName | ChangeDate | Reviewed | UniqueId |
| 2 | 7 | DocumentInfoView | Received document 10246914 | Received | | 4/4/2018 | DocumentNotificatior | 4/4/2018 7:07 | No | |
| 3 | 7 | DocumentInfoView | Received document 10246913 | Received | | 4/4/2018 | DocumentNotificatior | 4/4/2018 7:07 | No | |
| 4 | 7 | DocumentInfoView | Added Chest X-Ray/B-Reader Report, Cre | OriginalTrust | | CEL | firm super user | 4/4/2018 7:06 | No | |
| 5 | 7 | DocumentInfoView | Added Chest X-Ray/B-Reader Report, Cre | CreatedUserID | | firm super user | firm super user | 4/4/2018 7:06 | No | |

This image displays the most recent updates to the claim form which were the 2 documents that were uploaded on April 4th 2018. Below is a table of the Column headings and a brief description of each:

| Column Names | Description |
|---|---|
| Version | The new version of the claim form after the updates have been submitted. |
| TableName | This is the corresponding table name of the Claim Section. |
| IdInfo | This identifies the specific record edited and will be preceded with the word Added, Updated or Deleted. |
| ColumnName | This identifies the specific fields that were edited in the individual records, such as DocumentTypeName for new document uploads. |
| OldValue | The existing value of the field prior to the changes. |
| NewValue | The new value of the field after the changes. |
| UserName | The user who edited the records. |
| ChangeDate | The date the records were added, updated or deleted. |
| Reviewed | This is to indicate whether an edit has been reviewed or not. |
| UniqueId | This is to identify exposure records across the different versions of the claim form edited. |

## Editing Claims

To begin editing claims, the user must first navigate to the General page of the claim form as mention in the previous section. From this page, click on the <**Claim Form**> button, which will redirect the user to the Representation page of the claim form.




The user must first click the <**Edit**> button located at the top of the page to begin the edit process or click the <**Cancel**> button to return to the General page.

Once in edit mode, the claim will be locked out to this user until the edits have been submitted or cancelled. The claim will also display the name of the user editing the claim. No other user can edit or review this claim until the edits have been submitted or cancelled and linked claims cannot be edited or reviewed.

The user may navigate through the claim form by clicking on any of the page links on the left hand side or by clicking the <**Next**> button located at the top of the page.

After editing the claim, the user must proceed to the Finish page by clicking on the <**Finish**> button at the top of the page or the **Finish Claim** page link located on the left side bar menu. From the Finish page, you may either click on the <**Submit Claim**> button to accept the changes made to the claim or the <**Cancel**> button to discard all changes made.

## New Claims Submission

The New Claim page will allow users to submit a new claim for the Celotex Trust.

To begin the new claims submission(s), click on the **New Claim** link located on the top menu bar, which will re-direct the user to the **Choose Trust** page. From this page, sect the primary trust from the Trust drop-down and click the <**New Claim**> button to begin the process or <**Cancel**> to quit.

As mentioned in the previous sections, once the <**New Claim**> button is clicked, the user may navigate through the claim form using the Page Links or the <**Next**> button.

This next section will explain in detail all of the claim form pages and what specific information each section is requesting. This section will also explain what sections must be completed for the different process options as well as explaining what ****required fields*** must be entered before completing the claim process and the warning messages that are displayed:

- **Representation –** This is the very first page of the claim form. Select the representing attorney and enter any contact information necessary.
  - ***Attorney** - *Required field*.
  - **Contact** – This information should specify the information for the contact person at the law firm.

- **Process –** This section allows the user to select the appropriate review process for the claim from the following options:
  - **Discounted Cash Payment ("DCP")**
  - **Individual Review Claim ("IRC")**

- **Injured Party –** The section includes all of the injured party and personal representative information. The user must at least enter the Last Name and answer question 5 before moving on to other sections of the claim.
  - ***Last Name** - *Required field*.
  - ***Is injured party living**? - *Required field*.
  - ***Social Security Number –** This is not a required field for submitting a claim but if it is left blank, a W003 warning will be displayed on the finish page indicating that a 003 intake deficient code will be applied if submitted without this information.*
  - ***Date of Birth -** This is not a required field for submitting a claim but if it is left blank, a W004 warning will be displayed on the finish page indicating that a 004 intake deficient code will be applied if submitted without this information.*

- **Injuries–** This section allows the user to select all of the appropriate disease levels and their date of diagnosis. If selecting Other Cancer, please enter the type of other cancer. Level VI is not available for the ER process.

- **Dependent –** From this section, the user may enter all dependents that were financially supported by the injured party. This is only necessary for IR claims.

- **Occupational Exposure –** In this section, the user will enter all asbestos related exposure by clicking the <**Add Exposure**> button. Once an exposure is added, the user must click the <**Save**> button in order to save the newly added exposure. Repeat this process for each additional exposure record.

- **Secondary Exposure –** From this section, the user can enter any and all second hand or bystander exposure. For each secondary exposure record, an Exposure record must be completed for the occupationally exposed person. *Claimant must seek Individual Review of his or her claim.*

- **Smoking History –** From this section, the user may enter all of the smoking history for the injured party. *This is required for IR LC2 and IR Levels I through IV only*

- **Litigation –** From this section, the user will enter all asbestos related litigation by clicking the <**Add Litigation**> button. Once the litigation is added, the user must click the <**Save**> button in order to save the newly added litigation. Repeat this process for each additional litigation record. *Must be completed for IR claims.*

- **Disability –** From this section, the user will enter all information referring to disability benefits received.

- **Employment –** From this section, the user will enter all information referring to employment. *W2 and first page of Form 1040 for last year of full employment must be provided, if lost wages are being claim*.

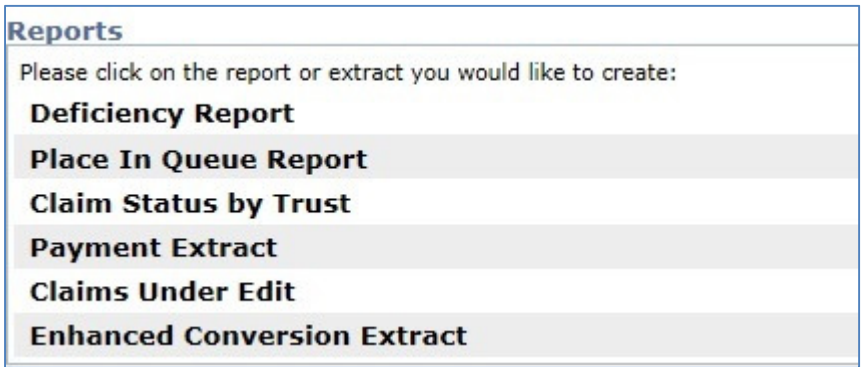
- **Documents –** This section allows the user to electronically submit supporting medical documents. The user may choose to fax documents using the Fax Cover Sheets or directly upload the document into the claim.

- **Finish Claim –** From this section, the user may *submit*, *save* or *delete* the claim.

# Chapter 4 Trust Online Reports

## Reports

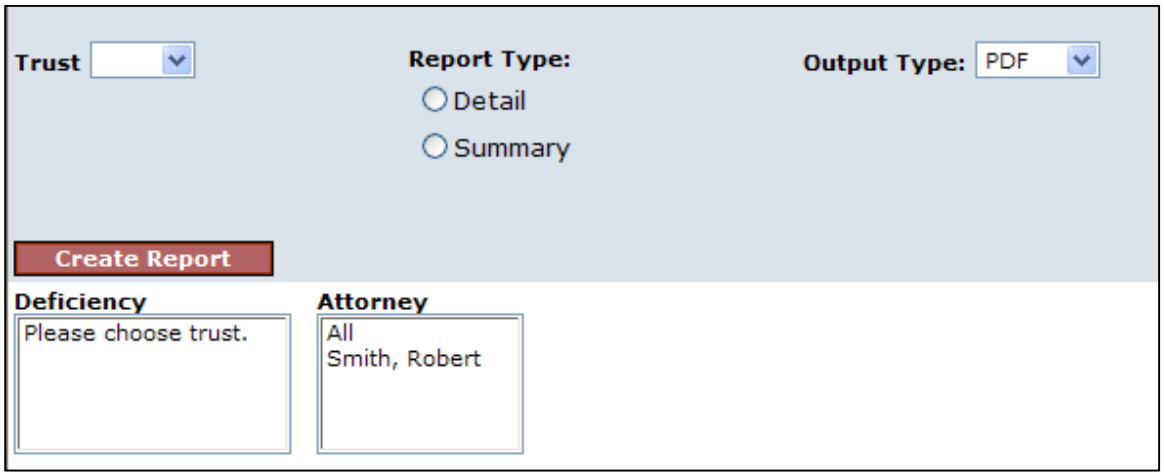
Trust Online provides users with pre-defined reports that may be viewed and/or extracted into a PDF file or spreadsheet. To begin running one of the five reports listed on this page, click on the **Reports** link located on the top menu bar.



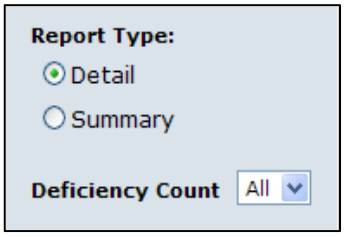

The Reports page currently list 6 reports: *Deficiency, Place In Queue, Claim Status by Trust, Payment Extract, Claims Under Edit* and *Enhanced Conversion Extract*. Except for the *Claims Under Edit* report, firms can create reports in one of the following formats: *CSV, EXCEL* or *PDF*.

### Deficiency Report

To create a Deficiency Report, click on the Deficiency Report link. Once this page is displayed, you will have several options to choose from.




The selections shown in the image above may control other selections from appearing. For example, when "**Detail**" is selected for the Report Type, a new criterion labeled "**Deficiency Count**" becomes visible. This new criteria is a drop-down that allows the user to include a specific number of deficiencies.



The following are the criteria that can be selected and a brief description of each:

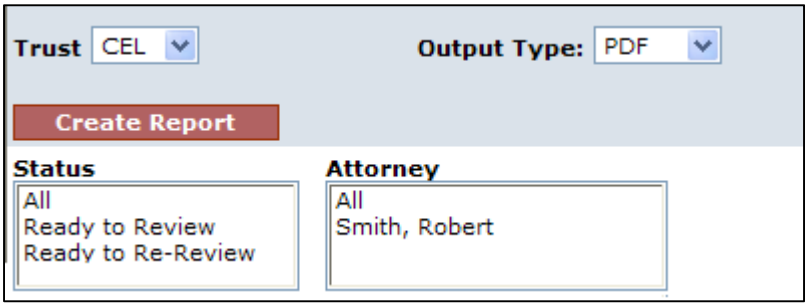
- **Trust** – This drop-down includes all of the Trust(s) the user has access to and must be selected prior to viewing any deficiencies in the **Deficiency** list box.
- **Report Type** – This section will give the user the option of selecting a Detail or Summary report;
    - **Detail –** This report provides the following information: *Claim Number*, *Firm File #, Last Name*, *First Name*, *SSN (Last 4 SSN)*, *Paperwork*, *Status* and the *deficiency code(s), which are all grouped by the Attorney.*
    - **Summary –** This report provides the following information: the *Deficiency Description* and the *Number of Claims* with these deficiencies which are also all grouped by the Attorney.
- **Deficiency Count –** When the "**Detail**" report type is selected, the user will have the options to include only the number of deficiencies selected from the drop-down box.
- **Deficiency –** This list box includes the following types of deficiency options as well as all the deficiency codes for the Trust selected: *All, All Intake, All Medical, All Exposure,* and *All Conversion*.
- **Attorney –** This list box includes the entire list of attorneys the user has access to. You may select "**All**" or one more of the attorneys listed.
- **Output Type –** This drop-down box provides the user with the option of viewing, printing or downloading the reports in the following formats: *PDF*, *Excel* and *CSV*.

After entering the criteria, click the <**Create Report**> button. A message box will appear prompting the user to *Open*, *Save* or *Cancel*.

## Place In Queue Report

The **Place In Queue** report provides the user with a listing of claims that are in the Review and/or Re-Review Queue with their respective "place in queue" number. This number provides the users with an approximation of how long their claims may remain in the queue until their claim comes up for Review or Re-Review.

To create a Place In Queue Report, click on the Place In Queue link. Once this page is displayed, you will have several options to choose from.




The following are the criteria that can be selected and a brief description of each:

- **Trust** – This drop-down includes all of the Trust(s) the user has access to and must be selected prior to viewing any statuses in the **Status** list box.

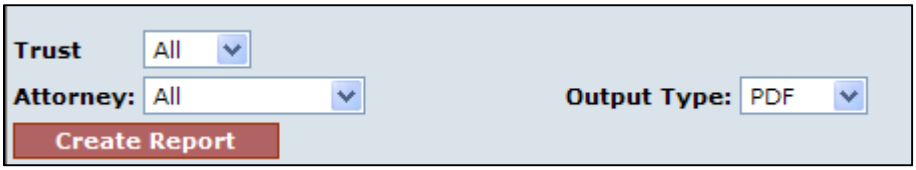
- **Status–** This list box includes the following types of statuses that can be selected: *All, Ready to Review, and Ready to Re-review.*
- **Attorney –** This list box includes the entire list of attorneys the user has access to. You may select "All" or one more of the attorneys listed.
- **Output Type –** This drop-down box provides the user with the option of viewing, printing or downloading the reports in the following formats: *PDF*, *Excel* and *CSV*.

After entering the criteria, click the <**Create Report**> button. A message box will appear prompting the user to *Open*, *Save* or *Cancel*. The report list the following information; *Firm Name*, *Attorney Name*, *Claim #*, *Firm File #, Injury*, (Process) *Option*, I*njured*, *SSN (Last 4 SSN)*, *PIQ*, *Received* (Date) and grouped by *Status*.

## Claim Status by Trust

The **Claim Status by Trust** report provides the user with a summary listing of all of their claims submitted to a specific trust, grouped by claim status.

To create the Claim Status by Trust Report, click on the Claim Status by Trust link. Once this page is displayed, you will have several options to choose from.




The following are the criteria that can be selected and a brief description of each:

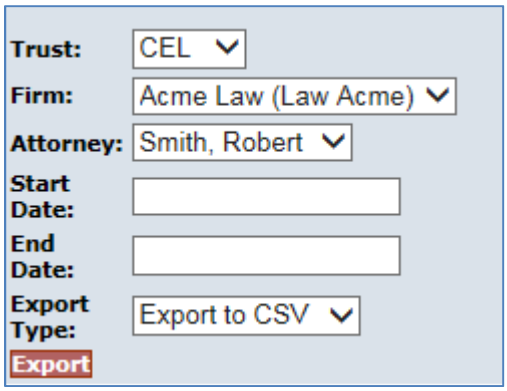
- **Trust** – This drop-down includes all of the Trust(s) the user has access to.
- **Attorney –** This drop-down box includes the entire list of attorneys the user has access to. You may select "All" or one of the attorneys listed.
- **Output Type –** This drop-down box provides the user with the option of viewing, printing or downloading the reports in the following formats: *PDF*, *Excel* and *CSV*.

After entering the criteria, click the <**Create Report**> button. A message box will appear prompting the user to *Open*, *Save* or *Cancel*. The report list the following information; *Claim #, Firm File #*, *Full Name*, *SSN (Last 4 SSN)*, *Attorney Name* and grouped by *Status*.

## Payment Extract

The **Payment Extract** report provides the user with a detailed listing of all of the paid claims submitted to a specific trust, filtered by Attorney and Date ranges.

To create this report, click on the Payment Extract link. Once this page is displayed, you will have several options to choose from.




The following are the criteria that can be selected and a brief description of each:

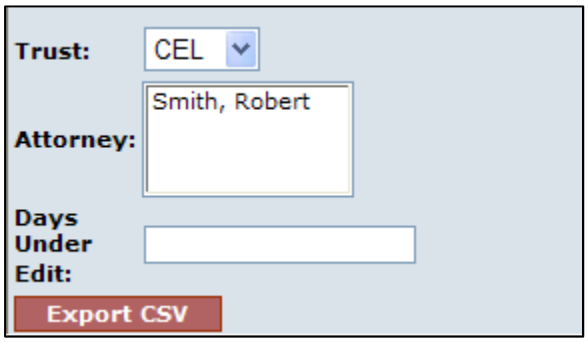
- **Trust** – This drop-down includes all of the Trust(s) the user has access to.
- **Attorney –** This drop-down box includes the entire list of attorneys the user has access to. You may select "All" or one of the attorneys listed.
- **Start Date –** Enter the Start date of the report requested. Payments created on the Start Date entered will be included in the report.
- **End Date –** Enter the End date of the report requested. Payments created on the End Date entered will be included in the report.
- **Export Type –** This drop-down box provides the user with the option of viewing, printing or downloading the reports in the following formats: *PDF, Excel* and *CSV*.

After entering the criteria, click the <**Export**> button. A message box will appear prompting the user to *Open*, *Save* or *Cancel*. The report provides the following information; *Trust, Firm Name, Attorney Last Name, Attorney First Name, Attorney Middle Initial, Claim Number, SSN (Last 4 SSN), Claimant Last Name, Claimant First Name, Claimant Middle Initial, Payment Date, Principal Amount and Sequence Adjustment Amount* and *Firm File Number.*

## Claims Under Edit

The **Claims Under Edit** report provides the user with a summary listing of all of the claims that are currently being edited.

To create the Claims Under Edit Report, click on the Claims Under Edit Report link. Once this page is displayed, you will have several options to choose from.




The following are the criteria that can be selected and a brief description of each:

- **Trust** – This drop-down includes all of the Trust(s) the user has access to.
- **Attorney –** This list box includes the entire list of attorneys the user has access to. You may select "All" or one or more of the attorneys listed.
- **Days Under Edit –** This field allows the user to specify the number of days the claims is being edited.

After entering the criteria, click the <**Export CSV**> button. A message box will appear prompting the user to *Open*, *Save* or *Cancel*. The report provides the following information; *Trust*, *Claim #*, *Account User*, *Account Last Name*, *Account First Name*, *Account Email*, *Firm Name*, *Claim Attorney*, *Edit Date*, *Linked*, *Status* and *Queue*.

# Chapter 5 Trust Online Notifications

## Notifications

Trust Online provides an electronic method of notifying law firms with updated information about their claims. Firms will still have the option to elect to receive paper notifications.

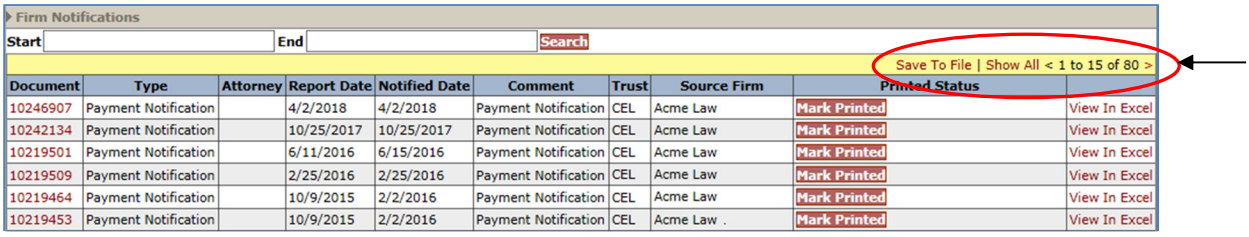
Notifications are provided for the following and are broken down into two levels:

- **Firm Level**
  - Payments
- **Attorney Level**
  - Offers
  - Release Deficiencies
  - Intake/Review Deficiencies
  - Activities
    - Prepetition Letters - (PREPETITN, PREPETITN2, etc.)
    - Duplicate Claim Letters - (Different Attorney, Same Attorney)

## Firm Level Notifications

Firm Level notifications refer only to the **Payment Notifications**. When payments are made, the facility will send an email notifying each authorized user to proceed to the Notifications page of Trust Online. After logging into Trust Online and proceeding to the Notifications page, the user will have the option to select a Trust to limit the number of notifications returned on the page.

The page automatically defaults to the AWI Trust (if available), therefore, the use will have to select the CEL Trust from the Trust drop-down. All Payment Notifications for this trust will be listed in a "Page File" view which displays the 15 most recent payment out of the total number of payments ever made for the specified trust.




| Document | Type | Attorney | Report Date | Notified Date | Comment | Trust | Source Firm | Printed Status | |
|---|---|---|---|---|---|---|---|---|---|
| 10246907 | Payment Notification | | 4/2/2018 | 4/2/2018 | Payment Notification | CEL | Acme Law | Mark Printed | View In Excel |
| 10242134 | Payment Notification | | 10/25/2017 | 10/25/2017 | Payment Notification | CEL | Acme Law | Mark Printed | View In Excel |
| 10219501 | Payment Notification | | 6/11/2016 | 6/15/2016 | Payment Notification | CEL | Acme Law | Mark Printed | View In Excel |
| 10219509 | Payment Notification | | 2/25/2016 | 2/25/2016 | Payment Notification | CEL | Acme Law | Mark Printed | View In Excel |
| 10219464 | Payment Notification | | 10/9/2015 | 2/2/2016 | Payment Notification | CEL | Acme Law | Mark Printed | View In Excel |
| 10219453 | Payment Notification | | 10/9/2015 | 2/2/2016 | Payment Notification | CEL | Acme Law . | Mark Printed | View In Excel |

The user may also filter the results by entering a Start and End Date and clicking the Search button. This will allow the user to strictly limit the number of payments that are displayed on the screen. *(See image on next page)*

The Firm Notifications which are displayed at the bottom section of this page includes the following information: *Document* (id), *Type, Report Date, Notified Date, Comment, Trust, Source Firm, Printed Status* and *View In Excel.*

Firm Notifications

Start 4/1/2018 End 4/30/2018 Search

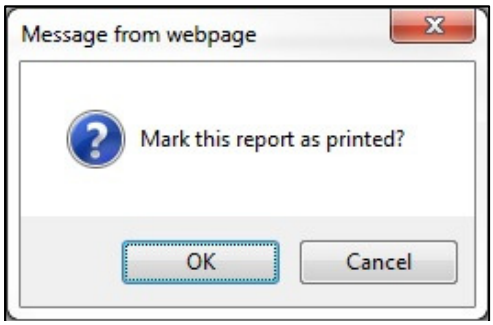
Save To File < 1 to 1 of 1 >

| Document | Type | Attorney | Report Date | Notified Date | Comment | Trust | Source Firm | Printed Status | |
|---|---|---|---|---|---|---|---|---|---|
| 10246911 | Payment Notification | | 4/3/2018 | 4/3/2018 | Payment Notification | CEL | Acme Law | Mark Printed | View In Excel |

*Date Filter View*

To view the actual notification document, click on the Document number which acts as a hyperlink. Once the PDF document is opened, the user may save or print it. The "**Print Status**" column provides the user with a button labeled <**Mark Printed**>.

Once the button is clicked, a warning message will be displayed prompting the user to click <**OK**> to proceed or <**Cancel**> to quit.




After clicking the <**OK**> button, a new message is displayed in the Print Status column with the username of the individual who printed the document and the time and date the document was printed.

Firm Notifications

Start 4/1/2018 End 4/30/2018 Search

Save To File < 1 to 1 of 1 >

| Document | Type | Attorney | Report Date | Notified Date | Comment | Trust | Source Firm | Printed Status | |
|---|---|---|---|---|---|---|---|---|---|
| 10246911 | Payment Notification | | 4/3/2018 | 4/3/2018 | Payment Notification | CEL | Acme Law | firm super user printed at: 5/11/2018 7:54 AM | View In Excel |

Although the "Printed Status" column shows that the document was printed, the Document number will continue to act as a hyperlink permitting the user to print the notification documents as many times as are needed.

The payment notifications permissions are controlled by and can only be updated by an administrator at the Facility. For firm user to gain access to the Firm Payment Notifications, the firm must contact the Facility to authorize their staff users to receive the email notification when payments are made. This can be accomplished by completing the ACH form and entering the Trust Online Username and e-mail address of the authorized person(s) who will receive the payment notifications.

Authorized person(s) must have an enabled Trust Online account with Trust specific access to receive payment notifications via email.

## Attorney Level Notifications

Attorney Level notifications refer to all other types of notifications including *Offers*, *Release Deficiency*, *Intake/Review Deficiency* and *Activities*. The notification preferences can be changed by the FSU and/or the submitting attorney with an Attorney account.

For more information on how to set up these notifications, see Chapter 1 Attorney Options.

When the Facility generates *New Releases*, *Deficiency Letters* and *Activity Letters*, Trust Online will send an email notifying each authorized user to proceed to the Notifications page. The Attorney Notifications are displayed in the top section of this page and includes the following information; *Document* (id), *Type*, *Attorney*, *Report Date*, *Notified Date*, *Comment*, *Trust*, *Source Firm* and *Printed Status*.

Attorney Notifications

Notification Type All Start End Search

Save To File | Show All < 1 to 15 of 20 >

| Document | Type | Attorney | Report Date | Notified Date | Comment | Trust | Source Firm | Printed Status |
|---|---|---|---|---|---|---|---|---|
| 10243264 | Intake/Review Deficiency Notification | Smith, Robert | 11/18/2017 | 11/18/2017 | Intake Deficiency Notification | CEL | Acme Law | Mark Printed |
| 10240961 | Intake/Review Deficiency Notification | SMITH, JOHN | 9/16/2017 | 9/16/2017 | Intake Deficiency Notification | CEL | Acme Law | Mark Printed |
| 10239904 | Intake/Review Deficiency Notification | Smith, Robert | 8/19/2017 | 8/19/2017 | Intake Deficiency Notification | CEL | Acme Law | Mark Printed |
| 10239214 | Offer Notification | Smith, Robert | 7/20/2017 | 7/25/2017 | Release Notification | CEL | Acme Law | Mark Printed |
| 10231018 | Intake/Review Deficiency Notification | Smith, Robert | 10/22/2016 | 10/27/2016 | Intake Deficiency Notification | CEL | Acme Law | Mark Printed |
| 10229467 | Intake/Review Deficiency Notification | SMITH, JOHN | 9/3/2016 | 9/3/2016 | Intake Deficiency Notification | CEL | Acme Law | Mark Printed |
| 10227972 | Duplicate Claim Activity Notification | SMITH, JOHN | 7/16/2016 | 7/16/2016 | Duplicate Claim Different Attorney Notification | CEL | Acme Law | Mark Printed |
| 10223115 | Intake/Review Deficiency Notification | SMITH, JOHN | 7/2/2016 | 7/2/2016 | Intake Deficiency Notification | CEL | Acme Law | Mark Printed |
| 10222806 | Intake/Review Deficiency Notification | SMITH, JOHN | 6/28/2016 | 6/28/2016 | Intake Deficiency Notification | CEL | Acme Law | Mark Printed |
| 10217722 | Intake/Review Deficiency Notification | SMITH, JOHN | 6/11/2016 | 6/11/2016 | Intake Deficiency Notification | CEL | Acme Law | Mark Printed |
| 10217641 | Intake/Review Deficiency Notification | Smith, Robert | 5/28/2016 | 5/28/2016 | Intake Deficiency Notification | CEL | Acme Law | Mark Printed |
| 10217624 | Intake/Review Deficiency Notification | SMITH, JOHN | 5/28/2016 | 5/28/2016 | Intake Deficiency Notification | CEL | Acme Law | Mark Printed |
| 10215037 | Prepetition Activity Notification | Smith, Robert | 5/23/2016 | 5/23/2016 | Received Money Pre-Petition (P2) Notification | CEL | Acme Law | Mark Printed |

Notice also that this section defaults to the "**Page File**" view, which means that only 15 notifications are viewable at a time. To view all notifications, click the "**Show All**" link located on the yellow bar above the column headings.

You may limit the number of notifications that appear by selecting one of the types from the Notification type drop-down. For example, select Intake/Review Deficiency Notification to only display all of the deficiency notifications. You may also limit this search even further by using a Start and End date criteria to only display notifications that were created between these date filter.

Choose Trust CEL

Notifications

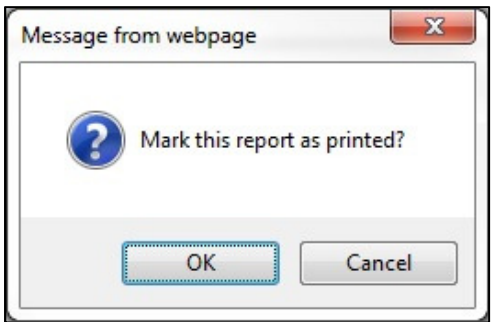
Attorney Notifications

Notification Type Intake/Review Deficiency Notification Start 9/1/2017 End 12/1/2017 Search

Save To File < 1 to 2 of 2 >

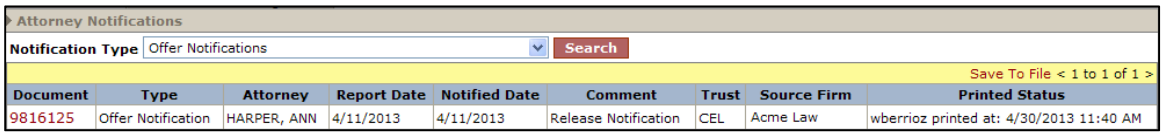
| Document | Type | Attorney | Report Date | Notified Date | Comment | Trust | Source Firm | Printed Status |
|---|---|---|---|---|---|---|---|---|
| 10243264 | Intake/Review Deficiency Notification | Smith, Robert | 11/18/2017 | 11/18/2017 | Intake Deficiency Notification | CEL | Acme Law | Mark Printed |
| 10240961 | Intake/Review Deficiency Notification | SMITH, JOHN | 9/16/2017 | 9/16/2017 | Intake Deficiency Notification | CEL | Acme Law | Mark Printed |

To view the notification document, click on the Document hyperlink number. Once the PDF document is opened, the user may save or print it. The "**Print Status**" column provides the user with a button labeled <**Mark Printed**>.




Once the button is clicked, a warning message will be displayed prompting the user to click <**OK**> to proceed or <**Cancel**> to quit.

After clicking the <**OK**> button, a new message is displayed in the Print Status column with the username of the individual who printed the document and the time and date the document was printed.




| Document | Type | Attorney | Report Date | Notified Date | Comment | Trust | Source Firm | Printed Status |
|---|---|---|---|---|---|---|---|---|
| 9816125 | Offer Notification | HARPER, ANN | 4/11/2013 | 4/11/2013 | Release Notification | CEL | Acme Law | wberrioz printed at: 4/30/2013 11:40 AM |

As with the Payment Notifications, the Document number will also continue to act as a hyperlink permitting users to re-print the notification documents.

# Chapter 6 Celotex Conversion

## Conversion

The Celotex Trust can only be converted to an AWI, BW, OC, FB, USG, FLX, FER or TN claim. Celotex cannot be converted from any Trust in Trust Online. Celotex does not offer the Linking option.

The conversion process takes existing *claim* and *review data* from the Celotex Trust claim (**Source Claim**) and imports this data into a new claim for another Trust (**Target Claim**). The Celotex claim used in this conversion process can be in any status or queue.

## Linking

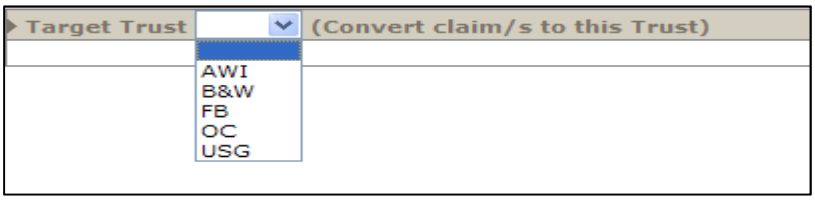
The Linking option is not available for Celotex claims.

### Conversion Process

The conversion process limits the amount of time needed to submit an entirely new claim. By using the conversion process, information that was previously entered during the Review decision as well as information submitted by the law firm for the Celotex Claim will carry across to the new Target Claim.

Using this process, only one new Target Claim can be submitted at a time. If additional Trust Claims need to be submitted from the Celotex Claim, the user will need to convert from the original Celotex Claim or the newly submitted Target Claim.

To begin the conversion process, log into Trust Online and proceed to the Conversion Page by clicking on the Conversion tab on the top menu bar. From this page, you will need to select the Target Trust from the drop-down.




Once the Target Trust is selected, additional search fields will be displayed allowing the user to search for their Celotex claim using one or more of the following criteria: *Last name*, *SSN*, *Claim Number*, *Firm File Number*, *Attorney* and/or *Deficiency Count*.

Target Trust B&W (Convert claim/s to this Trust)

Attorney: All, Smith, Robert

Last Name | Claim Number

SSN | Firm File Number | Deficiency Count All

Source Trust

Search | Clear

Users may also search for a list of claims to convert by selecting CEL from the **Source Trust** drop-down box. Once CEL is selected, additional search fields will be displayed allowing the user to search for their list of claims using one or more of the following criteria: *Status Code*, *Deficiency Code*, *Alleged Injury* and/or *Claim Options*.

Source Trust CEL

**Status Code**: All, Awaiting Quality Assurance, Deemed Withdrawn, Deferred

**Deficiency Code**: All, 001 - Death Certificate/None, 002 - Certificate of Official Capacity, 003 - Injured Party's Social Security Numbe

**Alleged Injury**: All, Asbestosis, Bilateral Pleural Disease, Colon/Rectal Cancer

**Claim Option**: All

Search | Clear

After specifying all of your search criteria, click the <**Search**> button. The Search Grid results will display a summary list of claim information from the Source Trust.

Save To File < 1 to 3 of 3 >

| Name | SSN | Firm File # | DOB | Claim # | Status | Injury | Confirmed Injury Date | Option | Release Amount | Paid Amount | Attorney | Deficiency Count | Source Trust |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Smith, Mary | *****6789 | | 1/1/1948 | 1351888 | Release Deficient | Asbestosis | 9/1/2010 | DCP | $690.00 | $0.00 | Smith | 2 | CEL |
| Smith, Mike | *****8412 | | 6/5/1960 | 1351944 | Intake Deficient | Asbestosis | | DCP | $0.00 | $0.00 | Smith | 3 | CEL |
| Smith, William | *****1541 | | 1/12/1935 | 1351943 | Hold | Mesothelioma | | DCP | $0.00 | $0.00 | Smith | 0 | CEL |

The information displayed includes *Name*, *SSN*, *Firm File #*, *DOB*, *Claim #*, *Status*, *Injury*, *Confirmed Injury*, *Confirmed Injury Date*, *Option*, *Release Amount*, *Paid Amount*, *Attorney*, *Deficiency Count*, and *Source Trust*.

To select a claim to be converted, click on the name of the injured party under the Name field heading. The following warning page will be displayed.

The claim is about to be processed for conversion.
This might take a few minutes.
Please do not refresh or close the browser until the operation completes to avoid duplicate conversions.

Ok

Click the <**OK**> button to continue to proceed to the Conversion Summary page. On this page, there are several sections pertaining to the information that is about to be converted.

At the top of the page, is the Source Trust information which includes the *Source Trust*, *Name*, *SSN*, *Date of Birth*, *Claim Number*, *Status*, *Alleged Injury*, *Evaluated Injury*, *Gross Settlement Value* and *Offer*.

| | | | |
|---|---|---|---|
| **Source Trust** | CEL | **Status** | Ready to Review |
| **Name** | SMITH, JOE | **Alleged Injury** | Asbestosis |
| **SSN** | 657459327 | **Evaluated Injury** | (none) |
| **Date of Birth** | 7/7/1945 | **Gross Settlement Value** | $0.00 |
| **Claim Number** | 2701003 | **Offer Amount** | $0.00 |

The **Review Results** button located under this section will provide the user with detailed information pertaining to the Review decisions. This will display the Exposure duration calculation and Medical confirmed information as well as the individual medical decisions that will be carried over to the Target Trust.

**Review Results**

During the conversion process, a **Conversion Summary** document will be uploaded to the claim as a Conversion Summary Type with a comment of **Source Trust Review Results**. This will provide the same information that is found by clicking the Review Results button above and will remain with the claim for its entirety.

The **Deficiencies** section lists any and all deficiencies that may arise from the conversion. Converting existing claims with deficiencies will result in deficiencies for the newly converted claim. This provides the user with opportunity to clear the deficiency by updating the claim form prior to submitting a new claim.

**Deficiencies**

Save To File < 1 to 1 of 1 >

| Deficiency Code | Description |
|---|---|
| 130 | Medical Report not Provided |

The **Warnings** section will display any warnings that may arise from the conversion such as duplicate claim or economic warnings.

**Warnings**

Save To File < 1 to 2 of 2 >

| Id | Warning |
|---|---|
| WA-DUPECLAIM | Claim appears to be a duplicate to another claim in the B&W database and requires research by the Trust. |
| WA-ECONOMIC | Claim requires research because it contains an economic loss value. |

The **Documents** section will display all of the documents that will be carried over to the new claim from the source trust claim.

**Documents**

Save To File < 1 to 3 of 3 >

| Document ID | Document Type | Comment | Received |
|---|---|---|---|
| 1789398 | Release | | 5/7/2009 |
| 1788434 | Physical Exam | | 2/17/2009 |
| 1788433 | Other | | 2/12/2009 |

At the bottom of the page, the user will not have the option to Link the source trust claim to the newly converted target trust claim. The "Link these claims" box will be grayed out and unchecked.

**Do you want to submit this CEL Data to B&W?**

**Yes** **No, enter alternate data.**

After clicking the <**Yes**> button, the user will be redirected to the first page (**Representation**) of the claim form. This will allow the users to update the new claim form with any Trust specific information prior to submitting it.