

October 2022

Trust Online User Manual

Delaware Claims Processing Facility Trust



Armstrong World Industries Asbestos Personal Injury Settlement Trust
P.O. Box 1079
Wilmington, DE 19899-1079
Email websupport@armstrongworldasbestostrust.com

Babcock & Wilcox Asbestos Settlement Trust
P.O. Box 8890
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Owens Corning/Fibreboard Asbestos Personal Injury Trust
P.O. Box 1072
Wilmington, DE 19899-1072
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T&N Subfund of the Federal-Mogul Asbestos Personal Injury Trust
P.O. Box 8401
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Flintkote Asbestos Trust
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FMP Subfund of the Federal-Mogul Asbestos Personal Injury Trust
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Pittsburgh Corning Corporation Asbestos Personal Injury Settlement Trust
P.O. Box 1032
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United States Gypsum Asbestos Personal Injury Settlement Trust
P.O. Box 1080
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WRG Asbestos PI Trust
P.O. Box 1390
Wilmington, DE 19899-1390
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Owens-Illinois Asbestos Personal Injury Trust
P.O. Box 1189
Wilmington, DE 19899-1189
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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 submission, updating and settling of asbestos related claims. This innovated 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 due 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 **Owens-Illinois Asbestos Injury 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. Next, enter the Two-Factor verification code received in your email. 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 OI Alerts.

Summary



Account Name
Smith, Joseph

UserName Firm Super User
Email jsmith@acmelaw.com

Acme Law
111 Rux Landing Str
P.O. Box 123
Foxville, CA 94948-6169

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.

Summary Statistics as of 9/23/2022 9:52:20 AM							
Description	B&W	CEL	FB	OC	OI	PCC	USG
Total Claims Submitted	73	18	41	45	13	33	77
Total Payments	\$674	\$0	\$529	\$27,223	\$0	\$1,307	\$819
Ready to Review	2	4	0	2	3	7	18
Intake Deficient	54	6	34	38	10	18	51
Review	1	1	0	1	0	1	1
Review Complete	0	0	0	0	0	0	0
Awaiting Quality Assurance	0	0	0	0	0	0	0
In Quality Assurance	0	0	0	0	0	0	0
Review Deficient	2	1	3	1	0	3	2
Ready to Re-Review	1	2	0	0	0	0	1
Offer Issued	7	2	0	0	0	1	0
Release Verified	0	0	0	0	0	0	0
Release Deficient	0	1	0	0	0	0	0
Paid	2	1	2	2	0	1	1
Partial Payment Paid	0	0	0	0	0	0	0
Payment Authorization	0	0	0	0	0	0	0
Deferred	0	0	1	0	0	0	0
Do Not Review	0	0	0	0	0	0	0
Withdrawn	1	0	1	1	0	1	2
Disallowed	0	0	0	0	0	0	0
Deemed Withdrawn	0	0	0	0	0	0	0
Hold	2	0	0	0	0	1	0
Draft	5	2	1	8	0	14	5
Research	1	0	0	0	0	0	0

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

Save To File < 1 to 2 of 2 >

Your account has access to these attorneys

GILLAM, SCOTT
BAGGETT SR., HARRY L.

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.

Summary
Claim Search
Feedback
New Claim
Conversion
User Accounts
Manage Access
Profile
Reports
Notifications

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 account gives the representing attorney more control over his 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 create the user 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, Account First Name, Username, Password, Confirm Password* and *Email*. In the Two-Step Verification section, enter the Email and/or Phone Number to receive the verification token. Place a check mark next to the **"Enable"** box and any other appropriate boxes for this user and click the **<Add>** button. The other four boxes will be explained in detailed 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.

Account Last Name	<input type="text"/>
Account First Name	<input type="text"/>
Username	<input type="text"/>
Account Type	Attorney ▾
Attorney	Select Attorney... ▾
Email	<input type="text"/>
Password	<input type="text"/>
Confirm Password	<input type="text"/>
Two-Step Verification	Enabled
Authenticator App	Not setup
Email	<input type="text"/>
Phone Number	+1 <input type="text"/>
Receive Announcements	<input type="checkbox"/> Check this box to receive periodic announcements from the facility.
View Summary Statistics	<input type="checkbox"/> Check this box to allow the user to view the summary statistics.
Hide Total Payment Statistics	<input type="checkbox"/> Check this box to exclude Total Payments from Summary Statistics.
Enabled	<input checked="" type="checkbox"/>
Read Only	<input type="checkbox"/>
Trust(s)	No trust(s) assigned.
	Add Cancel

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 these cases, 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 into 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.

Account Last Name	<input type="text"/>
Account First Name	<input type="text"/>
Username	<input type="text"/>
Account Type	Staff ▼
Email	<input type="text"/>
Password	<input type="password"/>
Confirm Password	<input type="password"/>
Two-Step Verification	Enabled
Authenticator App	Not setup
Email	<input type="text"/>
Phone Number	+1 <input type="text"/>
Receive Announcements	<input type="checkbox"/> Check this box to receive periodic announcements from the facility.
View Summary Statistics	<input type="checkbox"/> Check this box to allow the user to view the summary statistics.
Hide Total Payment Statistics	<input checked="" type="checkbox"/> Check this box to exclude Total Payments from Summary Statistics.
Enabled	<input checked="" type="checkbox"/>
Read Only	<input checked="" type="checkbox"/>
Trust(s)	No trust(s) assigned.
<input type="button" value="Add"/> <input type="button" value="Cancel"/>	

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.

Account Last Name	<input type="text" value="Account3"/>
Account First Name	<input type="text" value="Staff"/>
Username	<input type="text" value="staffaccount3"/>
Account Type	<input type="text" value="Staff"/>
Email	<input type="text" value="testuser@delcpf.com"/>
Password	<input type="password"/>
Confirm Password	<input type="password"/>
Two-Step Verification	Enabled
Authenticator App	<input type="button" value="Not setup"/>
Email	<input type="text" value="testuser@delcpf.com"/>
Phone Number	<input type="text" value="+1 8885551111"/>
Receive Announcements	<input type="checkbox"/> Check this box to receive periodic announcements from the facility.
View Summary Statistics	<input type="checkbox"/> Check this box to allow the user to view the summary statistics.
Hide Total Payment Statistics	<input checked="" type="checkbox"/> Check this box to exclude Total Payments from Summary Statistics.
Enabled	<input checked="" type="checkbox"/>
Read Only	<input checked="" type="checkbox"/>
Trust(s)	
	<input type="button" value="Save"/> <input type="button" value="Cancel"/>

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 Announcement** 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 Announcement** 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.

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 Trust 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.

Please request access to one or more trusts from your administrator.

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.

Trust Online R49.0

Welcome to Trust Online

In order to have access to this system you must click the "I AGREE" button below. By clicking the "I AGREE" box below, the Law Firm certifies that it is authorized by the Claimant to submit a claim, that all information submitted to the Facility during this on-line session shall comply in all respects with the requirements of Rule 11 of the Federal Rules of Civil Procedure, and that such information is being submitted subject to the terms of the Electronic Filer Agreement. In the event you wish to review the full text of the [Electronic Filer Agreement](#) you may do so by clicking the hyperlink.

I AGREE

Username

Password

[Change Password](#)

If you leave this session inactive for more than 30 minutes, the system will ask you to login again.

Would you like to sign up for an account?

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

Change Password

Username

Current Password

New Password

Confirm Password

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.

Change Password

Password changed successfully.

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.

The screenshot shows a login interface. At the top left, there is a checked checkbox labeled "I AGREE". A red banner message reads: "The password for your account has been reset. Please change your password." Below this, there is a "Username" field containing "firm super user" and a "Password" field. A "Change Password" link is positioned below the password field, and a "Login" button is at the bottom right.

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 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.

Account Name	Smith, John
Account Type	FirmSuperUser
Email	jsmith@gmail.com
User ID	firm super user
Last Name	* <input type="text" value="Smith"/>
First Name	* <input type="text" value="John"/>
Email	* <input type="text" value="jsmith@gmail.com"/>
Receive Announcements	<input checked="" type="checkbox"/> Check this box to receive periodic announcements from the facility.
View Summary Statistics	<input checked="" type="checkbox"/> Check this box to allow the user to view the summary statistics.
Hide Total Payment Statistics	<input type="checkbox"/> Check this box to exclude Total Payments from Summary Statistics.
Password	<input type="text"/>
Confirm Password	<input type="text"/>
Two-Step Verification	Enabled
Authenticator App	<input type="button" value="Setup"/>
Email	fsu@aol.com
Phone Number	<input type="text"/>
Firm Call In Passkey	<input type="text" value="8B29F3D"/>

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 *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
FB	Electronic
OC	Electronic
OI	Electronic
PCC	Electronic
USG	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	acme2 (rsmith@aol.com)
B&W	firm super user (tester@gmail.com)
OI	acme2 (rsmith@aol.com)
OC	acme2 (rsmith@aol.com)
OI	firm super user (tester@gmail.com)
OC	firm super user (tester@gmail.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				
Attorney Name	Activity Notifications	Intake/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

Save To File < 1 to 3 of 3 >

Offer Notifications

Include Smith, Robert in paper mailing.
 Enable Electronic Notification:

Trust	Account	
OC	staffaccount1 (testuser@delcpf.com)	X
--- Select Trust ---	--- Select Account ---	

eSignature Release Notifications

Enable Electronic Notification:

Trust	Account	
FMP	acme2 (rsmith@aol.com)	X
--- Select Trust ---	--- Select Account ---	

Release Deficiency Notifications

Include Smith, Robert in paper mailing.
 Enable Electronic Notification:

Trust	Account	
T&N	acme2 (rsmith@aol.com)	X
--- Select Trust ---	--- Select Account ---	

Intake/Review Deficiency Notifications

Include Smith, Robert in paper mailing.
 Enable Electronic Notification:

Trust	Account	
FLX	acme2 (rsmith@aol.com)	X
--- Select Trust ---	--- Select Account ---	

Activity Notifications (Duplicate Claims, Prepetition, etc.)

Include Smith, Robert in paper mailing.
 Enable Electronic Notification:

Trust	Account	
OI	staffaccount1 (testuser@delcpf.com)	X
--- Select Trust ---	--- 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.

Two-Step Verification code is incorrect or has expired.

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.

Verification code

Remember this computer

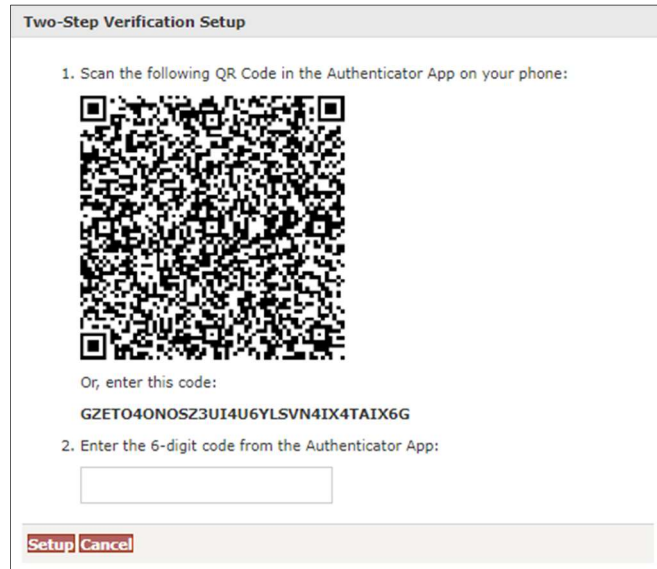
[Back](#) [Verify](#)

- Get a verification code from the Authenticator app
- Send me a verification code at (***)*-5555
Standard rates may apply
- Send me a verification code at
t*****r@gmail.com
- Need help? Contact your Firm Super User Robert Smith

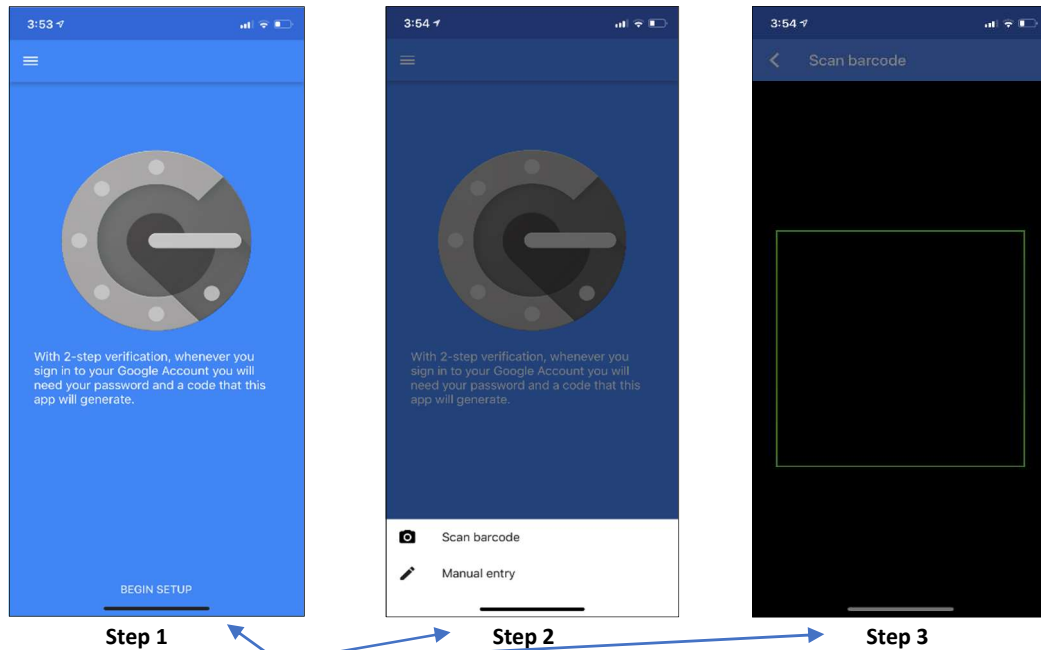
Once you are logged in, go to your Profile page and click on the Setup button to set-up the Authenticator App.

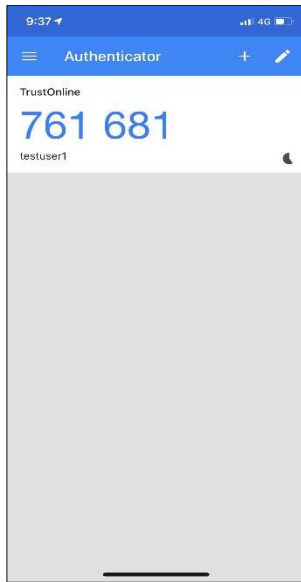
Two-Step Verification	Enabled
Authenticator App ⓘ	Setup
Email	testuser@gmail.com
Phone Number	
<i>(Please see your FSU to update the Email and Phone Number)</i>	

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: Enter the 6- digit verification code from the Authenticator App, into the Trust Online and click the Setup button

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.

Two-Step Verification	Enabled
Authenticator App	Setup completed Reset
Email	<input type="text" value="testuser@delcpf.com"/>
Phone Number	<input type="text" value="+1"/>

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.

Username	<input type="text" value="testuser1"/>
Password	<input type="password" value="*****"/>
	Change Password
	Login

Step 1

Verification code <input type="text"/> <input type="checkbox"/> Remember this computer Back Verify	Get a verification code from the Authenticator app
	Send me a verification code at (***)***-2222 Standard rates may apply
	Send me a verification code at t*****@gmail.com
	Need help? Contact your Firm Super User

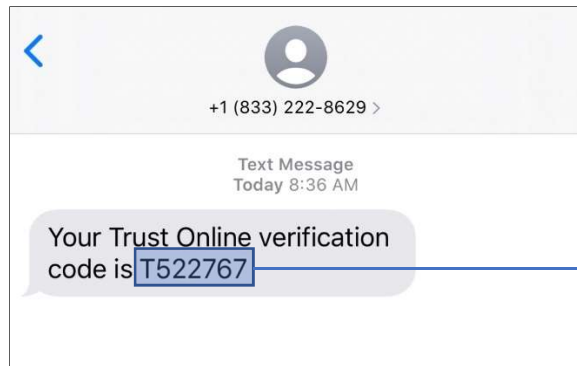
Step 2

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

<p>** Intended for: testuser@delcpf.com</p> <p>Your Trust Online verification code is T810657</p> <p>This e-mail message, including any attachments, is for Any unauthorized review, use, disclosure or distribuc</p>
--

Verification Code Received via Email

Verification Email



Verification Code Received via Text

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	Two-Factor Enabled	Enabled
Account, aStaff	staffaccount1	Acme Law (Law Acme)	Staff	CEL, OI	testuser@delcpf.com	All	Yes	Yes
Account3, Staff	staffaccount3	Acme Law (Law Acme)	Staff	B&W, CEL, OI	testuser@delcpf.com	Phone, Email	Yes	Yes
user, staff	staff_user	Acme Law (Law Acme)	Staff	B&W, CEL, OI	wberrioz@delcpf.com	App, Email	Yes	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 Claim 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**.

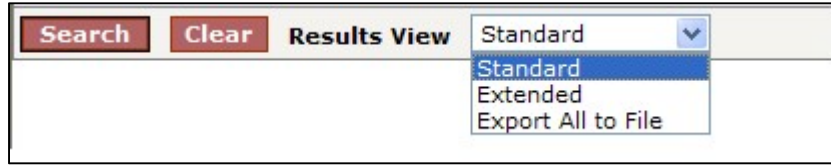
In this section, using the *Claim Number* is generally all you would need to find your claim. However, if the *Claim Number* is missing, it would be advisable to enter as much information as possible to filter your search results.

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



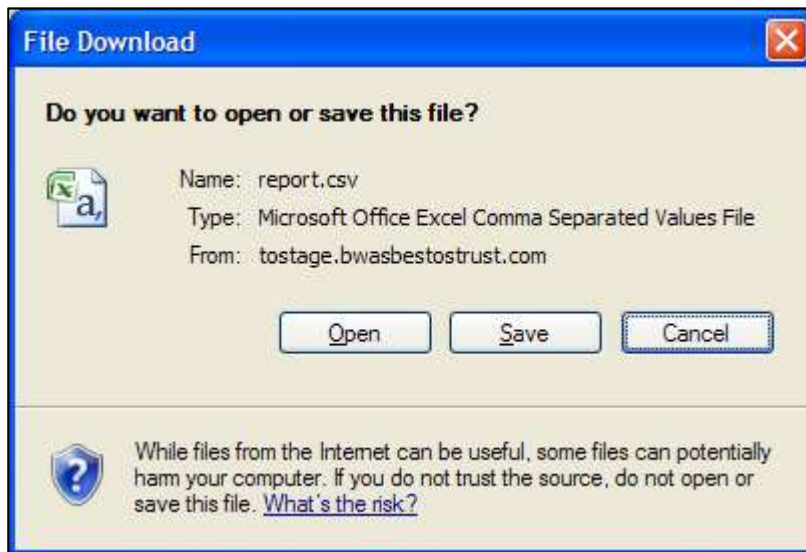
The **Results View** defaults to “**Standard**” and will provide the most basic claim information including *Name, SSN (Last 4 SSN), Trust, Attorney, Status, Queue, Deficiency Count, Pend Paperwork, Holds, Alleged Injury, Claim #, Firm File #, Option, Checked Out to and Linked.*

Name	SSN	Trust Attorney	Status	Queue	Deficiency Count	Pend Paperwork	Holds	Alleged Injury	Claim #	Firm File #	Option	Checked Out To	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., First Paid Date, Last Paid Std., Last Seq. Adj., Last Paid Date, DOB, PR Last Name, PR First Name, PR SSN (Last 4 SSN), Evaluated Injury, Deficiencies, Assigned To, Claim Value and Payment Offset.*

Date Received	Release \$	Last Release Date	Total Paid Std.	Total Seq. Adj.	First Paid Date	Last Paid Std.	Last Seq. Adj.	Last Paid Date	DOB	PR Last Name	PR First Name	PR SSN	Evaluated Injury	Deficiencies	Linked	Assigned To	Claim Value	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.

Save To File < 1 to 15 of 200 >

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

Search Clear Results View Standard First 200 of 1707 results displayed

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 Claim # displayed in the red font.

Claim #	Trust	Name	SSN	Attorney	Status	Queue
86000041	OI	Smith, Mary	*****3212	SMITH	Ready to Review	Review Queue

After clicking on the Claim #, 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.

General		Deficiency		Changes	
Claim Form		Documents		Print Claim Form	
		Defer Claim		Withdraw Claim	
Claim Number	2530485	Alleged Injury	Level II. Asbestosis/Pleural Disease		
Current Queue	Review Queue	Evaluated Injury			
Status	Ready to Review	Jurisdiction	NE		
CheckOut Date		Last Review Date			
Checked Out By	Not checked out.	Attorney	Smith, Robert		
Date Received	1/14/2016	Firm	Acme Law (Law Acme)		
Place in Queue	14524	Assigned To	[Dropdown]		
FIFO Number	201601141988021019580610	Firm Passkey	8B29F3D		
		eSign Key	D9117ED5		

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

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

B&W Weekly Average		
Date Updated	Initial Review	Re-review
7/1/2017	288	205

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

Document 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.

The screenshot shows the 'Documents' tab selected in the 'Claim Form' section. The interface includes buttons for 'Defer Claim' and 'Withdraw Claim'. The claim details are as follows:

Claim Number	2530485	Alleged Injury	Level II. Asbestosis/Pleural Disease
Current Queue	Review Queue	Evaluated Injury	
Status	Ready to Review	Jurisdiction	NE
CheckOut Date		Last Review Date	
Checked Out By	Not checked out.	Attorney	Smith, Robert
Date Received	1/14/2016	Firm	Acme Law (Law Acme)
Place in Queue	14524	Assigned To	
FIFO Number	201601141988021019580610	Firm Passkey	8B29F3D
		eSign Key	D9117ED5

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.

The screenshot shows the 'Documents' page with a sidebar menu on the left containing: Representation, Process, 1: Injured Party, 2: Injuries, 3: Exposure, 4: Secondary Exp, 5: Litigation, 6: Dependent, 7: Smoking History, 8: Economic Loss, Documents (highlighted), and Finish Claim. The main content area has buttons for 'Back', 'Next', and 'Finish' at the top, and 'Deficiencies Show' on the right. Below these, it states 'There are no documents.' and features two prominent buttons: 'Create Cover Sheet' and '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 Document by clicking the Browse button and finding the stored documents. Click the **Send Document** button in order to complete the upload process.

The screenshot shows the 'Add Document' dialog box with the following fields and buttons:

- File Edit View Favorites Tools Help (Menu)
- Add Document (Section Header)
- Document Type: Additional Supporting Medical Documents (Dropdown)
- Comments: (Text Input)
- Choose Document: Browse... (Button)
- Send Document (Button) and Cancel (Button)
- *Documents with the following extensions are allowed: .doc, .docx, .xls, .xlsx, .bmp, .gif, .jpeg, .jpg, .pdf, .png, .tif, .tiff, .rtf, .txt
- Also, the file uploaded should not exceed maximum size of 32 megabytes.

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 tools 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 documents". 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. A message will appear beneath the document's grid which will indicate that the documents are being restored but may be currently unavailable until the process has been completed.

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, Liquidated Value, Original Pmt%, Current Pmt%* and *Active*.

Releases						
						Save To File < 1 to 1 of 1 >
Release Date	Gross Value	Offset	Liquidated Value	Original Pmt %	Current Pmt %	Active
12/21/2016	\$104,882.36	\$0.00	\$104,882.36	35.00 %	35.00 %	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 Release 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	Liquidated Value	Original Pmt %	Current Pmt %	Active
12/21/2016	\$104,882.36	\$0.00	\$104,882.36	35.00 %	35.00 %	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 2 of 2 >
Payment Date	Payment Amount	Payment Type
1/7/2017	\$4,796.02	Sequencing Adjustment
1/7/2017	\$33,883.56	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.

The screenshot shows a software interface with a top navigation bar containing 'General', 'Deficiency', and 'Changes' tabs. Below this is a sub-navigation bar with 'Claim Form', 'Documents', and 'Print Claim Form' buttons. To the right are three buttons: 'Defer Claim', 'Withdraw Claim', and 'Updates Pending'. A red arrow points to the 'Updates Pending' button. The main area displays claim details in a two-column format:

Claim Number	2530591	Alleged Injury	Level III. Asbestosis/Pleural Disease
Current Queue	Deficiency Response Queue	Evaluated Injury	
Status	Review Deficient	Jurisdiction	MD
CheckOut Date		Last Review Date	12/1/2017
Checked Out By	Not checked out.	Attorney	Smith, Robert
Date Received	11/1/2016	Firm	Acme Law (Law Acme)
		Assigned To	<input type="text"/>
FIFO Number	30761945	Firm Passkey	8B29F3D
		eSign Key	65C8B37E

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.

The screenshot shows the same software interface as above, but the 'Updates Pending' button has been replaced by 'No Updates Pending'. A red arrow points to this new button. The claim details are updated as follows:

Claim Number	2530591	Alleged Injury	Level III. Asbestosis/Pleural Disease
Current Queue	Deficient Pending Update Tank	Evaluated Injury	
Status	Review Deficient	Jurisdiction	MD
CheckOut Date		Last Review Date	12/1/2017
Checked Out By	Not checked out.	Attorney	Smith, Robert
Date Received	11/1/2016	Firm	Acme Law (Law Acme)
		Assigned To	<input type="text"/>
FIFO Number	30584620	Firm Passkey	8B29F3D
		eSign Key	65C8B37E

DEFUPDATE (firm super user - 1/22/2019)

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, Pending* 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.

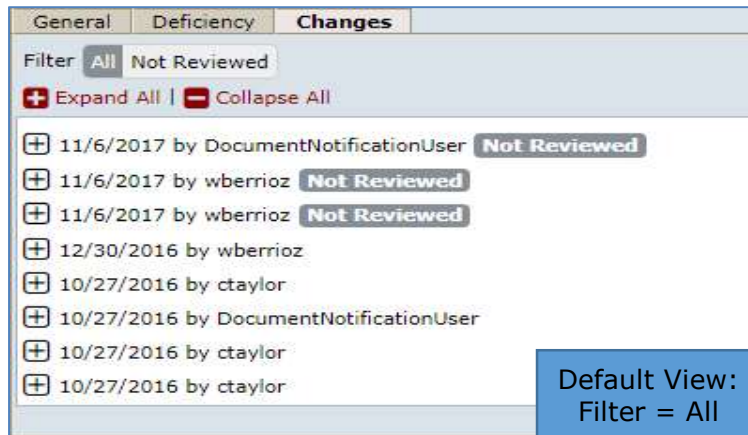
General Deficiency Changes									
Release Deficiencies									
There are no items.									
Standard Deficiencies									
Save To File < 1 to 9 of 9 >									
Deficiency Code	Description	Deficiency Date	Notification Date	Date Closed	Source	Status	Pending	Last Edit	
003	Injured Party's Social Security Number not Provided	3/23/2016	5/28/2016	none	B&W	Accepted		3/23/2016	
004	Injured Party's Date of Birth not Provided	3/23/2016	5/28/2016	none	B&W	Accepted		3/23/2016	
005	Original Lawsuit State not Provided	3/23/2016	5/28/2016	none	B&W	Accepted		3/23/2016	
006	Original Lawsuit Date not Provided	3/23/2016	5/28/2016	none	B&W	Accepted		3/23/2016	
007	Date of Alleged Diagnosis and/or Alleged Injury not Provided	3/23/2016	5/28/2016	none	B&W	Accepted		3/23/2016	
009	First and Last Dates of Exposure Not Provided	3/23/2016	5/28/2016	none	B&W	Accepted		3/23/2016	
010	Industry and Occupation not Provided	3/23/2016	5/28/2016	none	B&W	Accepted		3/23/2016	
014	Attachments not Provided	3/23/2016	5/28/2016	none	B&W	Accepted		3/23/2016	
019	Litigation Page Failure to Elect Jurisdiction	3/23/2016	5/28/2016	none	B&W	Accepted		3/23/2016	

The **Release** deficiencies are applied to the claim during the *release verify process* when a returned or uploaded release is missing necessary 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	
R01	Certificate of Official Capacity	9/16/2011	9/26/2011	none	B&W	Accepted		9/16/2011	
R08	Corrected SSN	9/23/2011	9/26/2011	none	B&W	Accepted		9/23/2011	

Changes Tab

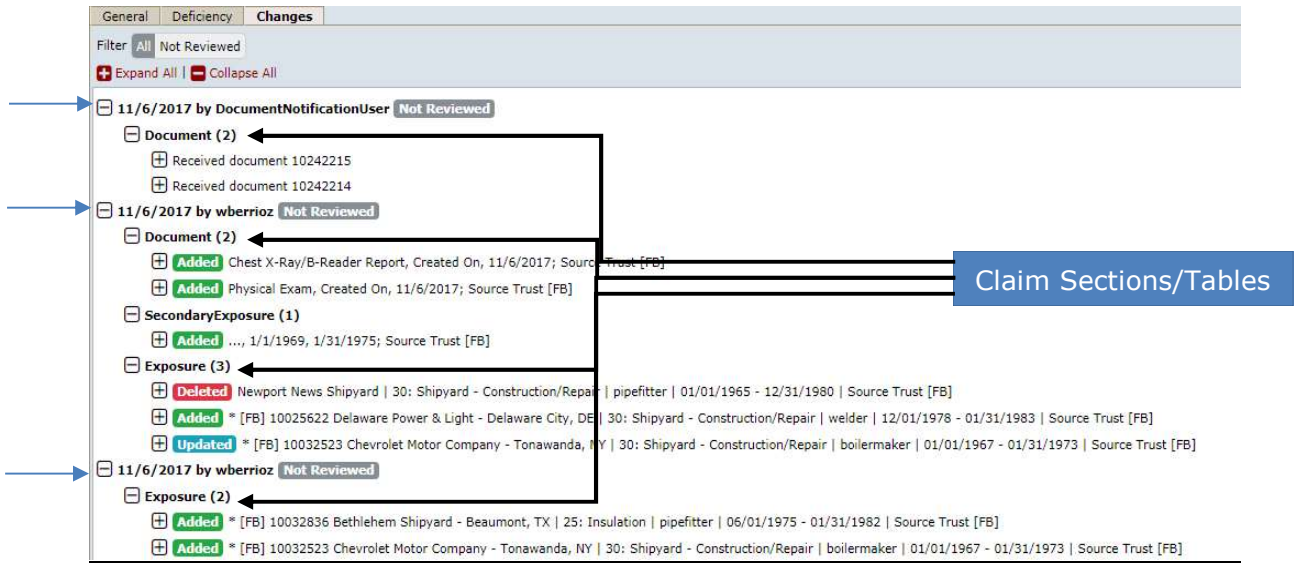
The **Changes** tab provides the user with a list of all of the edits that have ever been made to the claim. In the default view, seen below, edits will be automatically sorted by the most recent changes made to the claim. The user also has the option of selecting the **"Not Reviewed"** filter option. 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 recorded 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 11/6/2017, 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".

1. **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 November 6th 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 that 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
1: Injured Party	Exposed
2: Injuries	Exposed
3: Exposure	Exposure
4: Secondary Exp	SecondaryExposure
5: Litigation	Litigation
6: Dependent	Dependent
7: Smoking	Exposed
8: Economic Loss	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 only 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	9	DocumentInfoView	Received document 10242215	Received		11/6/2017	DocumentNotifi	11/6/2017 9:30	No	
3	9	DocumentInfoView	Received document 10242214	Received		11/6/2017	DocumentNotifi	11/6/2017 9:30	No	
4	9	DocumentInfoView	Added Chest X-Ray/B-Reader Repo	DocumentTypeName		Chest X-Ray/É	wberrioz	11/6/2017 9:29	No	
5	9	DocumentInfoView	Added Chest X-Ray/B-Reader Repo	DoNotLink		FALSE	wberrioz	11/6/2017 9:29	No	

This image displays the most recent updates to the claim form which were the 2 documents that were uploaded on November 6th 2017. 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.

Page
Links

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.

Claim #2208972 being edited by Smith, Joseph

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 single claim for any individual Trust or multiple claims for many Trusts at once.

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, select 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:
 - **Expedited ("ER")**
 - **Individual ("IR")**

- **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.
- **Injuries**– This section allows the user to select the appropriate disease level and the date of diagnosis. If selecting Level V – Other Cancer, please enter the type of other cancer. Level VI is not available for the ER process.
- **Exposure** – From 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.*
- **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.
- **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.*
- **Smoking** – 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.*
- **Economic Loss** – From this section, the user may enter the employment information for any economic loss that is being claimed. If claiming economic losses, the user must provide documentation in the form of an Economic Report, IRS Form W-2, the first page of IRS Form 1040 or other relevant supporting documents. *This is only necessary for IR claims.*
- **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.

Reports
Please click on the report or extract you would like to create:
Deficiency Report
Place In Queue Report
Claim Status by Trust
Payment Extract
Claims Under Edit
Enhanced Conversion Extract

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.

Trust <input type="text" value=""/>	Report Type: <input type="radio"/> Detail <input type="radio"/> Summary	Output Type: <input type="text" value="PDF"/>
Create Report		
Deficiency Please choose trust.	Attorney All Smith, Robert	

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.

Report Type: <input checked="" type="radio"/> Detail <input type="radio"/> Summary
Deficiency Count <input type="text" value="All"/>

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.

Trust		Output Type:	
OI		PDF	
Create Report			
Status	Attorney		
All	All		
Ready to Review	SMITH, JOHN		
Ready to Re-Review	Smith, Robert		

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*, *Injured*, *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 screenshot shows a form with the following elements:

- A dropdown menu labeled "Trust" with "All" selected.
- A dropdown menu labeled "Attorney:" with "All" selected.
- A dropdown menu labeled "Output Type:" with "PDF" selected.
- A red button labeled "Create Report" positioned below the "Attorney:" dropdown.

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*, *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, Queue and Firm File Number*.

Enhanced Conversion Extract

The **Enhanced Conversion Extract** report provides the user with information concerning the Source and Converted claims that were used in the Enhanced Conversion Process. This report is especially beneficial for Bulk Upload Users who enter specific claims to use in conversion, but permits the system to extract data from another claim specified by the Trust Online system.

To create the Enhanced Conversion Extract Report, click on the Enhanced Conversion Extract 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.
- **Start Date** – Enter the Start Date of the report requested. Conversions created on the Start Date entered will be included in the report.
- **End Date** – Enter the End Date of the report requested. Conversion created on the End Date entered will be included in the report.
- **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 provides the following information: *Conversion Date, System Specified, Chosen Trust, Source Trust, Destination Trust, Chosen Claim Number, Source Claim Number, Destination Claim Number, Last 4 SSN, Claimant Last Name and Claimant First Name*.

Enhanced Conversion Extract											
Conversion Date	System Specified	Chosen Trust	Source Trust	Destination Trust	Chosen Claim Number	Source Claim Number	Destination Claim Number	Last 4 SSN	Claimant Last Name	Claimant First Name	Firm File #
09/23/2022	Y	B&W	B&W	OI	2003811	2003811	86000133	***-**-6385	Stockmar	James E	173547.000
09/23/2022	Y	B&W	B&W	OI	2001287	2001287	86000121	***-**-5388	Verucchi	Raymond	156952.000
09/23/2022	Y	B&W	B&W	OI	2001287	2001287	86000122	***-**-5388	Verucchi	Raymond	156952.000
09/23/2022	Y	B&W	B&W	OI	2003543	2003543	86000128	***-**-5734	Prude3rd	Kenneth	133659.000
09/23/2022	Y	B&W	B&W	OI	2000081	2000081	86000116	***-**-3238	Pheal	Harold E	140000.000

Chapter 5 Trust Online Notifications

Notifications

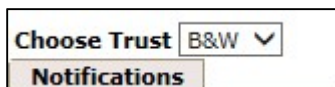
Trust Online provides an electronic method of notifying law firms with updated information about their claims. Firms will still have the option to elect to receive paper notifications.

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)
 - Reciprocal Letters - (RCPEXIST, RCPAIDAF, etc.)
 - Deferral Letters - (60 days out)

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 user will have to select a different Trust from the Trust drop-down, such as B&W or OI. All Payment Notifications for this trust will be listed in a "Page File" view which displays the 15 most recent payments 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	
10242130	Payment Notification		10/25/2017	10/25/2017	Payment Notification	B&W	Acme Law	Mark Printed	View In Excel
10219500	Payment Notification		6/11/2016	6/15/2016	Payment Notification	B&W	Acme Law	Mark Printed	View In Excel
10219459	Payment Notification		10/9/2015	2/2/2016	Payment Notification	B&W	Acme Law	Mark Printed	View In Excel
10219447	Payment Notification		10/9/2015	2/2/2016	Payment Notification	B&W	Acme Law	Mark Printed	View In Excel
10219494	Payment Notification		4/30/2015	2/2/2016	Payment Notification	B&W	Acme Law	Mark Printed	View In Excel
10219436	Payment Notification		11/12/2014	11/18/2014	Payment Notification	B&W	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.*

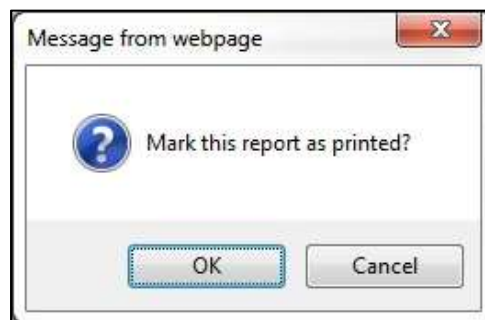


Document	Type	Attorney	Report Date	Notified Date	Comment	Trust	Source Firm	Printed Status	View In Excel
10242130	Payment Notification		10/25/2017	10/25/2017	Payment Notification	B&W	Acme Law	Mark Printed	View In Excel

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 this 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	View In Excel
10242130	Payment Notification		10/25/2017	10/25/2017	Payment Notification	B&W	Acme Law	firm super user printed at: 3/1/2018 1:36 PM	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*.

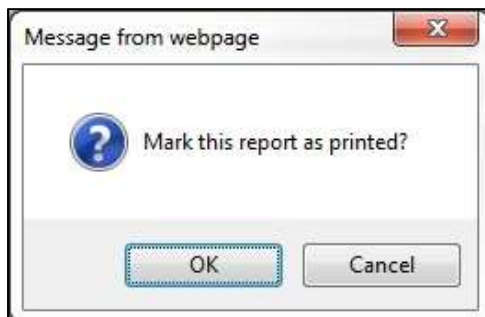
Document	Type	Attorney	Report Date	Notified Date	Comment	Trust	Source Firm	Printed Status
10280994	Intake/Review Deficiency Notification	Smith, Robert	9/23/2022	9/23/2022	Intake Deficiency Notification	OI	Acme Law	Mark Printed
10280991	Duplicate Claim Activity Notification	Smith, Robert	9/23/2022	9/23/2022	Duplicate Claim Same Attorney Notification	OI	Acme Law	Mark Printed
10280987	Duplicate Claim Activity Notification	Smith, Robert	9/23/2022	9/23/2022	Duplicate Claim Different Attorney Notification	OI	Acme Law	Mark Printed
10280955	Intake/Review Deficiency Notification	SMITH, JOHN	9/17/2022	9/17/2022	Intake Deficiency Notification	OI	Acme Law	Mark Printed
10280954	Intake/Review Deficiency Notification	Smith, Robert	9/17/2022	9/17/2022	Intake Deficiency Notification	OI	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. When there are more than 15 notifications in the grid and you may need to view all notifications, click the “**Show All**” link located on the yellow bar above the column headings. If less than 15 notifications, only the “**Save To File**” link will be shown. (See image above)

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.

Document	Type	Attorney	Report Date	Notified Date	Comment	Trust	Source Firm	Printed Status
10280994	Intake/Review Deficiency Notification	Smith, Robert	9/23/2022	9/23/2022	Intake Deficiency Notification	OI	Acme Law	Mark Printed
10280955	Intake/Review Deficiency Notification	SMITH, JOHN	9/17/2022	9/17/2022	Intake Deficiency Notification	OI	Acme Law	Mark Printed
10280954	Intake/Review Deficiency Notification	Smith, Robert	9/17/2022	9/17/2022	Intake Deficiency Notification	OI	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.

Attorney Notifications								
Notification Type Intake/Review Deficiency Notification Start 9/1/2022 End 9/29/2022 Search								
Save To File < 1 to 3 of 3 >								
Document	Type	Attorney	Report Date	Notified Date	Comment	Trust	Source Firm	Printed Status
10280994	Intake/Review Deficiency Notification	Smith, Robert	9/23/2022	9/23/2022	Intake Deficiency Notification	OI	Acme Law	firm super user printed at: 9/29/2022 7:07 AM
10280955	Intake/Review Deficiency Notification	SMITH, JOHN	9/17/2022	9/17/2022	Intake Deficiency Notification	OI	Acme Law	Mark Printed
10280954	Intake/Review Deficiency Notification	Smith, Robert	9/17/2022	9/17/2022	Intake Deficiency Notification	OI	Acme Law	Mark Printed

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

Notification Documents Archived

In order to increase the security of Trust Online, a new process was added to the Notifications page that will archive "All" notification documents dated prior to March 23, 2009. Each of the Notification documents that are archived will be denoted by an asterisk after the Document ID.

Choose Trust WRG								
Notifications								
Attorney Notifications								
Notification Type Offer Notification Start End Search								
Save To File < 1 to 6 of 6 >								
Document	Type	Attorney	Report Date	Notified Date	Comment	Trust	Source Firm	Printed Status
10222961	Offer Notification	Smith, Robert	6/29/2016	6/30/2016	Release Notification	WRG	Acme Law	Mark Printed
10184629	Offer Notification	Smith, Robert	12/29/2014	12/29/2014	Release Notification	WRG	Acme Law	Mark Printed
10184590	Offer Notification	Smith, Robert	12/22/2014	12/22/2014	Release Notification	WRG	Acme Law	Mark Printed
10183470	Offer Notification	Smith, Robert	12/2/2014	12/2/2014	Release Notification	WRG	Acme Law	Mark Printed
10177556	Offer Notification	Smith, Robert	7/24/2014	7/25/2014	Release Notification	WRG	Acme Law	Mark Printed
10190313 *	Offer Notification	Smith, Robert	3/20/2009	3/20/2009	Release Notification	WRG	Acme Law	Mark Printed

* Indicates that the document has been archived. Please contact web support to view the document.

The user may request to have these documents archived by contacting the web support department at 866.665.5790.

Chapter 6 Trust Online Conversion & Linking

Conversion & Linking

Trust Online has created a method that allows the conversion and linking of claims for the purpose of sharing data. The conversion process takes existing *claim* and *review data* from one Trust (**Source Claim**) and imports this data into a new claim for another Trust (**Target Claim**). The linking process will allow these claims to be connected in order to continue to share this data.

The Source Claim used in the conversion process can be any claim previously submitted to Delaware Claims Processing Facility and can be in any status or queue. Claims that have an active release or payment, such as claims in the Offer Issued status or greater, can be used as the Source Claim, but cannot be linked to the Target Claim.

Conversion Process

The Trust Online Conversion Process has been enhanced to enable the system to suggest a Source Trust claim. The system will do this by taking into consideration a number of factors with the objective of expediting the processing of the new claim. You will still have the option of ignoring the system suggestion and choosing the Source Trust claim directly.

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 Source 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 Source Claim, the user will need to convert from the original Source 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 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 source claim using one or more of the following criteria: *Last Name*, *Last 4 SSN*, *Claim Number*, *Firm File Number*, *Attorney* and/or *Deficiency Count*.

Target Trust: (Convert claim/s to this Trust)

Attorney:
 SMITH, JOHN
 Smith, Robert
 Z, A (Inactive)

Last Name: Claim Number:

Last 4 SSN: Firm File Number: Deficiency Count:

Source Trust:

Users may also search for a list of claims to convert by selecting a Trust from the **Source Trust** drop-down box. Once a Source Trust 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:

Status Code:
 Awaiting Quality Assurance
 Deemed Withdrawn
 Deferred

Deficiency Code:
 000 - Failure To Choose Claim Process
 001 - Death Certificate not Provided
 003 - Injured Party's Social Security Number

Alleged Injury:
 Level VIII. Mesothelioma
 Level VII. Lung Cancer 1
 Level VI. Lung Cancer 2

Claim Option:


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.

Claim #	Trust	Name	SSN	Firm File #	DOB	Status	Injury	Confirmed Injury Date	Option	Release Amount	Attorney	Deficiency Count	Source Trust
11569273	OC	test, Tone	*****8787		1/1/1940	Intake Deficient	Level VIII. Mesothelioma		Expedited	\$0.00	SMITH	1	<input checked="" type="checkbox"/> OC
11569431	OC	Woods, John	*****5236		1/8/1950	Intake Deficient	Level VIII. Mesothelioma		Expedited	\$0.00	SMITH	1	<input checked="" type="checkbox"/> OC
11569444	OC	Williams, John	*****5555	acme707	4/12/1923	Intake Deficient	Level VIII. Mesothelioma		Expedited	\$0.00	SMITH	1	<input checked="" type="checkbox"/> OC
11569475	OC	Johnson, Bart	*****4165		1/1/1936	Intake Deficient	Level VIII. Mesothelioma		Expedited	\$0.00	SMITH	1	<input checked="" type="checkbox"/> OC
11569493	OC	Myers, Walter	*****1452		1/12/1945	Intake Deficient	Level VIII. Mesothelioma		Expedited	\$0.00	SMITH	1	<input checked="" type="checkbox"/> OC
11569495	OC	White, Henry	*****5252		1/1/1920	Intake Deficient	Level VIII. Mesothelioma		Expedited	\$0.00	SMITH	1	<input checked="" type="checkbox"/> OC


The information displayed includes *Claim #*, *Trust*, *Name*, *SSN*, *Firm File #*, *DOB*, *Status*, *Injury*, *Confirmed Injury Date*, *Option*, *Release Amount*, *Attorney*, *Deficiency Count* and *Source Trust (field)*: which includes the Trust and the new "System Selected" buttons .

Besides the new System Selected button, the injury field has been updated to display either the *Confirmed Injury*, if it exists, or the *Alleged Injury* from the claim form. The *Confirmed Injury Date* field will be populated if there is a *Confirmed Injury* as a result of the current review of the claim, but if the *Confirmed Injury Date* is blank, the *Injury* field will be populated with the *Alleged Injury*. The *Deficiency Codes* field has been removed from the results as well.

System Selected Option

When searching for claims, the results will include all of the claims for the individual claimant. As mentioned in the previous section, for each search result, the **Source Trust** column will now include the **"System Selected"** button  to use the claim the system has determined would expedite processing.

The user may select the new button on any of the search results displayed and the system will select the source claim to use in the conversion process. In this example, the user selected the **"System Selected"** button next to the OC Trust button on the second line.

Smith, John	*****0098	4/12/1938	11154401	Review Deficient	Non-Confirmed	Individual	\$0.00	\$0.00	Smith	9	 OC
-------------	-----------	-----------	----------	------------------	---------------	------------	--------	--------	-------	---	--

After clicking this button, the system chose the AWI claim rather than the OC claim to convert to the new OI trust. To use this as your Source Trust claim, simply click "Yes" on the next box. However, you can still choose not to use the system selected claim by selecting the "Convert from Original Selection" link.

Do you want to submit this AWI Data to OI?


Link these claims

Yes No, enter alternate data. Convert from Original Selection

Note: Claims that have an **active release** or **payment** can be used as the Source Trust claim for conversion but cannot be linked. For these types of claims, the "Link these claims" box will be grayed out and unchecked.

If you choose "Convert from Original Selection", a warning will be displayed confirming your choice.

Message from webpage X

 Are you sure you want to convert from this Claim? Allowing the system to select the Claim to convert may result in faster processing times.

After clicking OK, the page will be refreshed with the originally selected claim.

Do you want to submit this OC Data to OI?

Link these claims

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 edit/update the claim form with any Trust specific information such as questions that are found in the Exposure and Litigations page prior to submitting.

Converting Same Trust Claims

The conversion process has been modified to allow users to convert claims from one Trust to the same Trust in order to create a new target claim. This only applies to one of the following scenarios:

- **Second Injury Claims** – a previously submitted **non-malignant** source claim can be converted to a new **malignant** target claim for the same claimant within the same trust. This previously restricted feature will allow firms to submit Second Injury claims by converting from the original claim.

Note: If the alleged injury of the target claim is not a progression from the source claim’s alleged injury, the conversion will result in both claims being placed on Duplicate Hold.

- **Previously Withdrawn Claims** – a claim that was withdrawn can now be converted to a new claim within the same trust. This new feature will allow firms to convert information from a withdrawn claim to a new claim rather than submitting a new claim manually.

Converting Non-Malignant IR to ER (OI Only)

Since the Owens-Illinois Trust does not allow for non-malignant claims to be processed as Individual Review (IR), when converting IR non-malignant claims to the OI Trust, the conversion process will default the new OI Trust claim to Expedited Review (ER) (See below):

- All IR Level claims I - III will default the process option for the OI Trust to ER.
- All other IR Level claims will default to the same process option for the OI Trust as the Source Trust claim.

Linking

The Linking process mentioned in the previous section can occur as the result of the Conversion process, but also can be implemented when submitting a brand new claim using the “New Claim” tab. Once the claim is completed, on the Finish page, the user will have the option to link this claim to any and all trust they have access to by clicking on the respective Trust check box.

Finish Claim
 If you are satisfied with contents of this claim, click Submit. If you want to discard all changes you have made, click Cancel.

Comments: [Add Comment](#)



If you intend to submit this information to multiple Trusts, please check the appropriate boxes below. This will link the claims. Updates to this claim will be automatically applied to all its linked claims. Claims do not have to be linked but doing so will allow updates and review decisions to be applied to all linked claims. Claims can be unlinked at any time. However, once claims are unlinked, they can not be re-linked in the future and all future responses must be submitted separately. In addition, review decisions will no longer be carried over between unlinked claims.

* As of 11/04/2008, edits to the claim Process Option will not carry across linked claims. After initial submission, Process Option changes must be made on a trust-by-trust basis.

WRG
 FK
 FMP
 OI

[Submit Claim](#) [Cancel](#) [Save Draft](#)

Once the link is created, a Chain Link image will be displayed in the claim header marquee illustrating to the user that there are linked-claims associated with this particular claim.



PCC #:82002094 **Name:** Stern, William **DOB:** 6/22/1932 **Deceased/DOD:** No,(none) **Status:** Ready to Review
SSN: *****8596 **Firm File#:** (none) **Lit Date:** (none) **Queue:** Review Queue
Option: Expedited **Alleged Injury:** Level VIII. Mesothelioma **Confirmed Injury:** (none)
Received: 9/29/2022 **Firm:** Acme Law

Furthermore, at the bottom of the General Page, there is a Linked Claims section that displays all of the claims that are linked and their current status. The Claim Number field is a hyperlink that can be clicked on to open that particular claim in a new window.

Linked Claims		
Save To File < 1 to 4 of 4 >		
Trust	Claim Number	Status
FMP	34004727	Ready to Review
WRG	38003997	Ready to Review
FK	72006387	Ready to Review
OI	86000211	Ready to Review

These claims will stay linked until a release is generated on one of the linked claims or the firm user *affirmatively* unlinks them from the finish page prior to submitting edits to one of the linked claims.

When a release is generated on one of the linked claims, this claim will unlink itself from the group while the other claims continue to be linked.

To unlink claims, the user must first make an edit to one of the claims that will continue to be part of the linked claims set. On the finish page, uncheck the box next to the claims that need to be unlinked and click the **<Submit Claim>** button.

FMP; 34004727; Ready to Review
 WRG; 38003997; Ready to Review
 FK; 72006387; Ready to Review
 OI; 86000211; Ready to Review

Submit Claim
Cancel

Once the edits have been submitted, the claims that were unchecked will no longer be part of the linked claims. For example, in the image above, the FMP and WRG claims were unchecked and became unlinked. These claims will stay unlinked and can never be linked again to its original linked claim set.

Linked Claims			Unlinked Claims		
Save To File < 1 to 2 of 2 >			Save To File < 1 to 2 of 2 >		
Trust	Claim Number	Status	Trust	Claim Number	Date
FK	72006387	Ready to Review	FMP	34004727	9/29/2022
OI	86000211	Ready to Review	WRG	38003997	9/29/2022

On the General page, an Unlinked Claims section will now be displayed next to the Linked Claims section and will provide the user with the Trust, Claim Number and Date the claims became unlinked.


Editing Linked Claims

The benefits of linking claims are apparent when having to edit claims with new or missing information. When editing one of these claims in the link set, the user is in fact editing all of the claims in the link set.


Although the linking process does eliminate much of the time needed to update multiple claims, there are certain fields in the claim form that do not carry across to the linked claims and will have to be edited individually.





In this next section, we will navigate through a set of linked claims and briefly point out the claim form pages and individual fields that carry across to its linked claims as well as those that will need to be edited on a claim by claim basis.

There are basically 13 sections that make up the entire claim form, which are listed below with their associated claim pages.





The pages displayed below with a chain link icon  represent pages in the claim form that share data across all Trust and do not have to be edited individually (if changes are made to this information on any of the linked claims, they will carry across to the other linked claims):

- **Representation**


-  *Representation Page* – The information provided on this page is shared across all Trust and do not have to be edited individually.

- **Process**
 - *Process* – The claim process option will need to be edited on a claim by claim basis. This field is only linked during initial claim submission.
- **1: Injured Party**
 -  *Injured Party Information* – All of the fields in this section are shared across Trust, except for the following field that will need to be edited on a claim by claim basis.
 - *Medical Health Insurance Claim Number (HICN) (FMP, PCC, WRG, OI Only)*
 -  *Deceased Injured Party* – The information provided in this section is shared across all Trust and do not have to be edited individually.
 -  *Injured Party Mailing Address* – The information provided in this section is shared across all Trust and do not have to be edited individually.
 -  *Personal Representative* – The information provided in this section is shared across all Trust and do not have to be edited individually.
- **2: Injuries**
 - *Part 2: Diagnosed Asbestos-Related Injuries* – The information provided on this page is shared across all Trust except for the last question on the page that ask “For claims filed against the Trust or any other asbestos defendant in the tort system prior to the Petition Date please check this box if you have a report of a diagnosing physician who conducted the physical exam...”. This field will need to be edited on a claim by claim basis.
- **3: Exposure**
 - *Site/Plant Section* – All of the fields in this first section are shared across Trust, except for the following fields that will need to be edited on a claim by claim basis:
 - *[Trust] Specific Code*
 - *Trust Specific Product*
 - *Additional Exposure Description (AWI Only)*
 - *Lincoln County Description (WRG Only)*
 - *Exposure Details Section* – All of the fields in this next section are shared across Trust, except for the following fields that will need to be edited on a claim by claim basis:
 - *Trust Specific Product (BW Only)*
 - *SOE Presumptive Question (AWI Only)*
 - *Company Exposure Section (OC, FB, TN, FER, FLX Only)* – This section only pertains to the OCFB and T&N Subfund Trust and are not shared

between the individual entities of each trust; therefore, these fields will need to be edited on a claim by claim basis.

-  *Occupational Exposed Section* – The information provided in this section is shared across all Trust and do not have to be edited individually.
- **4: Secondary Exposure**
 - *Part 4: Exposure to an Occupationally Exposed Person* – All of the fields in this next section are shared across Trust, except for the following field that will need to be edited on a claim by claim basis:
 - *4.6 Exposure Description* – This field will need to be edited on each of the linked claims.
- **5: Litigation**
 - *Asbestos Litigation* – All of the fields in this next section are shared across Trust, except for the following fields that will need to be edited on a claim by claim basis:
 - *Named As Defendant (1a)* – This field will need to be edited on each of the linked claims, except between OC and FB and between the T&N Subfund Entities (TN, FER, FLX) which do share this information between entities of their respective Trust.
 - *Received Money (1f)* – This field will need to be edited on each of the linked claims.
 - *Sign Release (1g)* – This field will need to be edited on each of the linked claims. This field does not pertain to BW claims.
 - *Workmen's Compensation (1h)* – This field only pertains to the T&N Subfund accounts and is shared across each of the entities in the Subfund (TN, FER, FLX).
 - *State Elected To Filed (2)* – This field will need to be edited on each of the linked claims.
 - *Tolling Agreement* – This section of the Litigation page will need to be edited on a claim by claim basis.
 - *Administrative Settlement* – This section of the Litigation page will need to be edited on a claim by claim basis. This field does not pertain to AWI claims.
- **6: Dependent**
 -  *Dependent* – The information provided in this section is shared across all Trust and do not have to be edited individually.
- **7: Smoking**
 -  *Smoking* – The information provided on this page is shared across all Trust and do not have to be edited individually.
- **8: Economic Loss**
 -  *Economic Loss* – The information provided on this page is shared across all Trust and do not have to be edited individually.

- **Documents**

-  *Documents* – The information provided on this page is shared across all Trust and do not have to be edited individually.