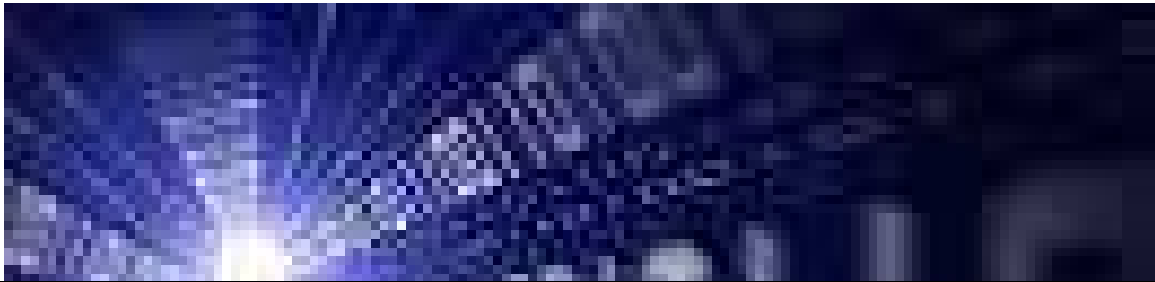
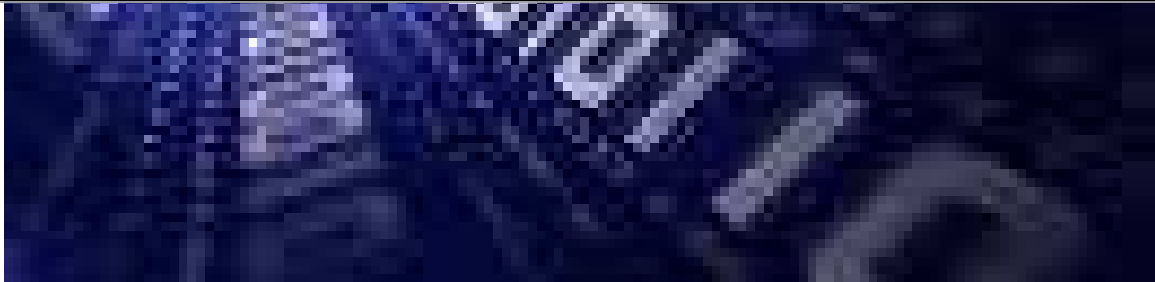


SEPTEMBER 2014



DELAWARE
CLAIMS
PROCESSING
FACILITY

TRUST ONLINE USER MANUAL



Babcock & Wilcox Asbestos Trust

Table of Contents

Chapter 1 Firm Super User1

The Firm Super User Account1

 Password Expiration2

 Change Password.....2

Creating Accounts4

Staff Accounts4

Attorney Accounts5

 Enabling/Disabling Accounts (Check Box).....5

 Read Only (Check Box)5

 Receive Announcements (Check Box)6

 View Summary Statistics(Check Box)6

Managing User Access7

Access By Accounts8

Access By Attorney.....8

Access By Trust.....9

Firm Super User Profile.....9

Payment Option.....10

Firm Payment Notifications.....10

Attorney Options11

Chapter 2 Trust Online User Functions12

Claim Search.....12

Search Results.....13

Downloading Results.....14

The Claim14

General Tab14

 Button Functions15

 Place In Queue.....15

 Firm Passkey15

 Updates Pending.....16

Medical Tab17

 Physical Exam/Medical Reports17

 X-Ray17

 PFT (Pulmonary Function Test)17

 Pathology/Autopsy17

 CTScan18

Deficiency Tab18

 Standard Deficiency18

Release Deficiency	18
Changes Tab.....	19
Versions.....	19
Table.....	19
Identifying Info.....	19
Date Changed	20
Reviewed	20
Editing Claims	20
New Claim Submission.....	21
Representation	22
Process.....	22
Injured Party	22
Exposure	22
Secondary Exposure	22
Litigation	22
Dependent.....	22
Smoking.....	23
Economic Loss	23
Documents.....	23
Finish Claim	23
<i>Chapter 3 Trust Online Reports.....</i>	<i>24</i>
Reports	24
Deficiency Reports.....	24
Place In Queue Report	25
Claim Status by Trust	26
Payment Extract	26
Claims Under Edit.....	27
<i>Chapter 4 Trust Online Notifications</i>	<i>29</i>
Notifications	29
Firm Level Notifications	29
Attorney Level Notifications.....	30
<i>Chapter 5 Trust Online Conversion & Linking</i>	<i>32</i>
Conversion & Linking.....	32
Conversion Process.....	32
System Selected Option	34
Conversion Same Trust Claims.....	35
Second Injury Claims	35
Previously Withdrawn Claims.....	35
Linking	36
Editing Link Claims	37

Representation	38
Process	38
1:Injured Party	38
2:Injuries	38
3:Exposure	38
4:Secondary Exposure	39
5:Litigation	39
6:Dependent	39
7:Smoking	39
8:Economic Loss	40
Documents	40

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 **Babcock & Wilcox Asbestos Personal Injury Settlement Trust**, and click on the Login link located on the right menu bar.



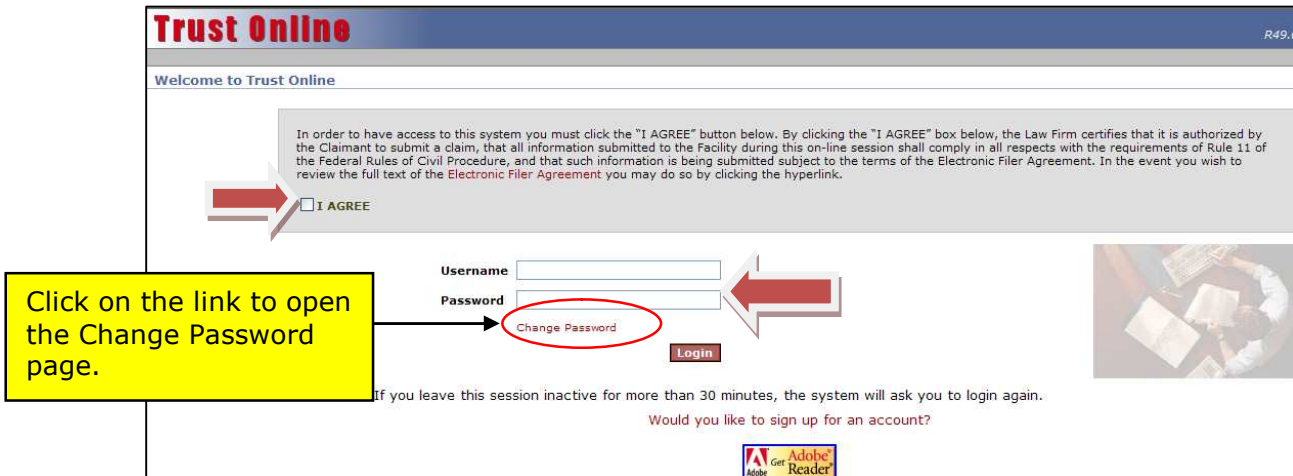
By clicking on this Login link, you will be directed to the Trust Online login page. Each and every time a user chooses to log into Trust Online, they must click on the 'I Agree' check box immediately below the disclaimer. By clicking on this check box, the user is agreeing to the terms specified in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

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

Password Expiration

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

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



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

The screenshot shows the "Change Password" form. It has four input fields: "Username" (containing "firm super user2"), "Current Password" (masked with dots), "New Password" (masked with dots), and "Confirm Password" (masked with dots). Below the fields is a "Change Password" button.

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

The screenshot shows the "Change Password" page with a success message: "Password changed successfully." Below the message is a "Login" button.

After successfully logging in to Trust Online, the 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 BW 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 5/3/2012 2:47:40 PM						
Description	AWI	B&W	FB	OC	USG	
Total Claims Submitted	199	196	110	164		165
Total Payments	\$0	\$3,084	\$0	\$0		\$109,908
Ready to Review	68	60	36	42		47
Intake Deficient	110	96	66	106		83
Review	1	2	0	0		0
Review Complete	0	0	0	2		0
Awaiting Quality Assurance	0	1	0	0		1
In Quality Assurance	1	0	0	0		0
Review Deficient	0	1	0	1		0
Ready to Re-Review	12	20	5	8		8
Offer Issued	0	1	0	0		0
Release Verified	0	0	0	0		0
Release Deficient	0	1	0	0		0
Paid	0	2	0	0		20
Partial Payment Paid	0	0	0	0		0
Payment Authorization	0	0	0	0		0
Deferred	2	0	0	0		0
Do Not Review	0	1	0	0		2
Withdrawn	4	10	3	5		4
Disallowed	0	0	0	0		0
Deemed Withdrawn	1	0	0	0		0
Hold	0	1	0	0		0
Draft	13	16	5	7		9
Research	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*.

Statistics **Attorneys**

Save To File < 1 to 2 of 2 >

Your account has access to these attorneys

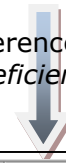
GILLAM, SCOTT
BAGGETT SR., HARRY L.

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

The FSU's **"Profile"** tab will be used to set the notification preferences for all *Activities (Duplicate Claims, Prepetition, etc.), Intake/Review Deficiencies, Release Deficiencies and Offers.*



Creating Accounts

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

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

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

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

Last Name User Name Trust

Staff Accounts

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

Account Last Name
Account First Name
Username
Account Type
Password
Confirm Password
Email
Receive Announcements Check this box to receive periodic announcements from the facility.
View Summary Statistics Check this box to allow the user to view the summary statistics.
Hide Total Payment Statistics Check this box to exclude Total Payments from Summary Statistics.
Enabled
Read Only
Trust(s)

ADD STAFF ACCOUNTS

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.

The screenshot shows a web form for creating an attorney account. The form includes the following fields and options:

- Account Last Name:
- Account First Name:
- Username:
- Account Type:
- Attorney:
- Password:
- Confirm Password:
- Email:
- Receive Announcements: Check this box to receive periodic announcements from the facility.
- View Summary Statistics: Check this box to allow the user to view the summary statistics.
- Hide Total Payment Statistics: Check this box to exclude Total Payments from Summary Statistics.
- Enabled:
- Read Only:
- Trust(s): No trust(s) assigned.

At the bottom of the form are two buttons: **Add** and **Cancel**. A yellow callout box with the text **ADD ATTORNEY ACCOUNTS** and a yellow arrow points to the **Add** button.

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 for staff 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:

Account First Name:

Username:

Account Type:

Password:

Confirm Password:

Email:

Receive Announcements: Check this box to receive periodic announcements from the facility.

View Summary Statistics: Check this box to allow the user to view the summary statistics.

Hide Total Payment Statistics: Check this box to exclude Total Payments from Summary Statistics.

Enabled:

Read Only:

Trust(s): No trust(s) signed.

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:

Account First Name:

Username:

Account Type:

Password:

Confirm Password:

Email:

Receive Announcements: Check this box to receive periodic announcements from the facility.

View Summary Statistics: Check this box to allow the user to view the summary statistics.

Hide Total Payment Statistics: Check this box to exclude Total Payments from Summary Statistics.

Enabled:

Read Only:

Trust(s): B&W, HAL, N, J, OC, USG

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.

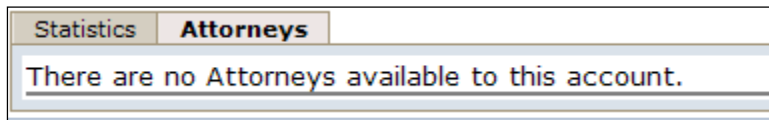
For existing accounts, search for the account and click on the account name to view the account profile. Afterwards, check the **Hide Total Payment Statistics** box and click the **<Save>** button.

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 >>.

The screenshot shows the 'By Account' tab selected. The 'Account' dropdown menu is set to 'Smith, Joseph (staffaccount)'. Below this, there are two list boxes: 'No Access' and 'Access'. The 'No Access' list contains the name 'Smith, Robert'. The 'Access' list is currently empty. Between the two list boxes are four red navigation buttons: '<<', '<', '>', and '>>'.

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 >>.

The screenshot shows the 'By Attorney' tab selected. The 'Attorney' dropdown menu is set to 'Smith, Robert'. Below this, there are two list boxes: 'No Access' and 'Access'. The 'No Access' list contains the name 'Smith, Joseph (staffaccount)'. The 'Access' list contains two names: 'King, Test (kingfirm)' and 'Smith, Joseph (Firm Super User)'. Between the two list boxes are four red navigation buttons: '<<', '<', '>', and '>>'.

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 **<<**.

Firm Super User Profile

Trust Online provides account information for each user on their Profile page. The Firm Super User account type will be able to view the following account information including *Account Name*, *Account Type*, *Email Address*, *User ID*, *Last Name*, *First Name*, *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	John, Smith
Account Type	FirmSuperUser
Email	jsmith@aol.com
User ID	firm super user2
Last Name	* <input type="text" value="John"/>
First Name	* <input type="text" value="Smith"/>
Email	* <input type="text" value="jsmith@aol.com"/>
Receive Announcements	<input 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"/>
Firm Call In Passkey	<input type="text" value="asbestos2012"/>

In addition, the Firm Administrator 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
- 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	Paper Check
USG	Paper Check

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	
<input type="checkbox"/>	Include Acme Law in paper mailing.
<input checked="" type="checkbox"/>	Enable Electronic Notification:
Trust	Account
B&W	Smith, Joseph (jsmith@acmelaw.com)
USG	Smith, Joseph (jsmith@acmelaw.com)
B&W	Smith, Robert (rsmith@aol.com)
USG	Smith, Robert (rsmith@aol.com)

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

Attorney Options

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

Attorney Options				
Save To File < 1 to 2 of 2 >				
Attorney Name	Activity Notifications	Intate/Review Deficiency Notifications	Release Deficiency Notifications	Offer Notifications
Smith, Robert	Electronic	Paper & Electronic	Electronic	Paper & Electronic
Yousefi, Pouya	Electronic	Paper & Electronic	Electronic	Paper & Electronic

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

Notification Options

Offer Notifications

Include Smith, Robert in paper mailing.

Enable Electronic Notification:

Trust	Account	
B&W	Smith, Robert	X
USG	Smith, Robert	X
All	--- Select Account ---	

Release Deficiency Notifications

Include Smith, Robert in paper mailing.

Enable Electronic Notification:

Trust	Account	
B&W	Smith, Robert	X
USG	Smith, Robert	X
All	--- Select Account ---	

Intake/Review Deficiency Notifications

Include Smith, Robert in paper mailing.

Enable Electronic Notification:

Trust	Account	
B&W	Smith, Robert	X
USG	Smith, Robert	X
All	--- Select Account ---	

Activity Notifications (Duplicate Claims, Prepetition, etc.)

Include Smith, Robert in paper mailing.

Enable Electronic Notification:

Trust	Account	
B&W	Smith, Robert	X
USG	Smith, Robert	X
All	--- Select Account ---	

Save **Cancel**

Chapter 2 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**, **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.

The screenshot shows the 'Claim Search' form with the following fields and options:

- Last Name: [Text Input]
- SSN: [Text Input]
- Claim Number: [Text Input]
- Firm File Number: [Text Input]
- Deficiency Count: [All] (dropdown)
- Pending Paperwork: [] (dropdown)
- Attorney: [All] (dropdown)
- Assigned To: [All] (dropdown)
- Trust: [] (dropdown)
- Buttons: Search, Clear, Results View, Standard (dropdown)

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

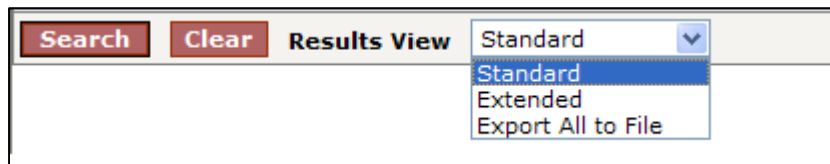
At the bottom of the page is the Trust search section which allows the user to search for claims using the additional following criteria; **Trust**, **Activity Code**, **Deficiency Code**, **Alleged Injury**, **Claim Option**, **Status Code** and **Queue**.

The screenshot shows the 'Trust' search form with the following fields and options:

- Activity Code: [All] (dropdown menu with options: 2008PYHOLD - 2008 Payment Hold, 2ndDISEASE - Second Disease Claim, ADMINHOLD - Administrative Hold)
- Deficiency Code: [All] (dropdown menu with options: 000 - Failure To Choose Claim Process, 001 - Death Certificate not Provided, 003 - Injured Party's Social Security Numbe)
- Alleged Injury: [All] (dropdown menu with options: Level VIII. Mesothelioma, Level VII. Lung Cancer 1, Level VI. Lung Cancer 2)
- Claim Option: [All] (dropdown)
- Status Code: [All] (dropdown menu with options: Awaiting Quality Assurance, Deemed Withdrawn, Deferred)
- Queue: [All] (dropdown menu with options: Audit Queue, Awaiting Document Tank, Change Research Queue)
- Trust: B&W (dropdown)
- Buttons: Search, Clear, Results View, Standard (dropdown)

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



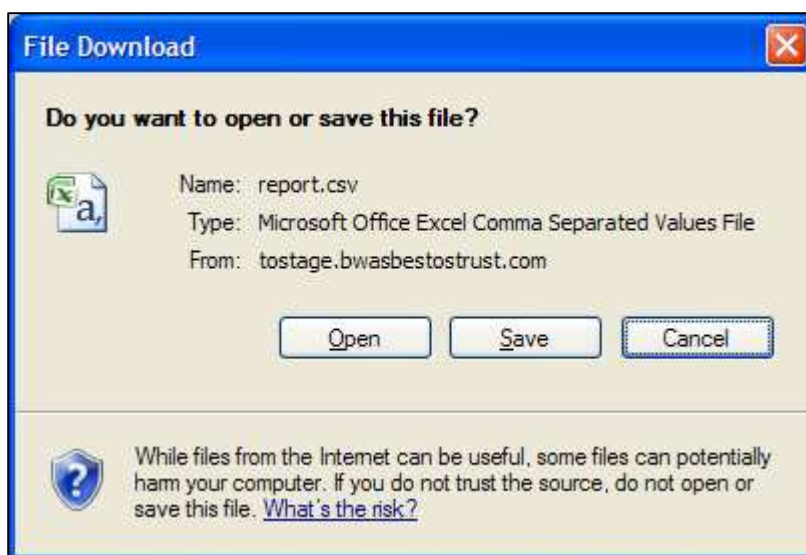
The **Results View** defaults to “**Standard**” and will provide the most basic claim information including *Name, SSN, Trust, Attorney, Status, Queue, Deficiency Count, Pend Paperwork, Holds, Alleged Injury, Claim #, Firm File #, Option, Checked Out to* and *Linked*.

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., Paid Date, DOB, PR Last Name, PR First Name, PR SSN, Evaluated Injury, Deficiencies, Assigned To* and *Payment Offset*.

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



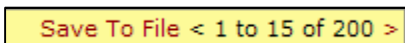
This file will be opened or saved as a “.**csv**” file. To save the file as an excel spreadsheet, with the file opened, click “**Save As**” and select “**Excel Workbook**”. The newly saved file will now display the correct excel file extension, (**.xls**).

Downloading Results

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

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

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



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



The Claim

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

Name	SSN	Trust	Attorney	Status	Queue
Smith, Mary	*****7879	B&W	Smith	Ready to Review	Review Queue

After clicking on the Name, a new window will open displaying the claimant’s general information. The general information is listed under the **General** tab and will always be the first page displayed. There are three other tabs: **Medical**, **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 Medical Deficiency Changes									
Claim Form		Documents		Print Claim Form		Defer Claim		Withdraw Claim	
Claim Number	2210956	Alleged Injury	Level VI. Lung Cancer 2						
Current Queue	Review Queue	Evaluated Injury							
Status	Ready to Review	Jurisdiction	AK						
CheckOut Date		Last Review Date							
Checked Out By	Not checked out.	Attorney	Smith, Robert						
Date Received	10/6/2008	Firm	Acme Law						
Place in Queue	15190	Assigned To	<input type="text"/>						
FIFO Number	200904081993032319400223	Firm Passkey	asbestos2012						

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

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

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

B&W Weekly Average		
Date Updated	Initial Review	Re-review
7/1/2012	641	754

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.

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 web application interface with a top navigation bar containing 'General', 'Medical', 'Deficiency', and 'Changes'. Below this is a secondary navigation bar with buttons: 'Claim Form', 'Documents', 'Print Claim Form', 'Defer Claim', 'Withdraw Claim', and 'Updates Pending'. The 'Updates Pending' button is highlighted with a red arrow. The main content area displays claim details in a two-column layout:

Claim Number	2211411	Alleged Injury	Level IV. Severe Asbestosis
Current Queue	Deficient Tank	Evaluated Injury	Level II. Asbestosis/Pleural Disease
Status	Review Deficient	Jurisdiction	DE
CheckOut Date		Last Review Date	6/5/2012
Checked Out By	Not checked out.	Attorney	Smith, Robert
Date Received	12/14/2009	Firm	Acme Law
FIFO Number	3741923	Assigned To	<input type="text"/>
		Firm Passkey	asbestos2012

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 web application interface as above, but the 'Updates Pending' button has been replaced by 'No Updates Pending', which is highlighted with a red arrow. The claim details are updated:

Claim Number	2211411	Alleged Injury	Level IV. Severe Asbestosis
Current Queue	Deficient Pending Update Tank	Evaluated Injury	Level II. Asbestosis/Pleural Disease
Status	Review Deficient	Jurisdiction	DE
CheckOut Date		Last Review Date	6/5/2012
Checked Out By	Not checked out.	Attorney	Smith, Robert
Date Received	12/14/2009	Firm	Acme Law
FIFO Number	3741924	Assigned To	<input type="text"/>
		Firm Passkey	asbestos2012

At the bottom of the interface, there is a text label: DEFUPDATE (firm super user2 - 6/5/2012)

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.

Medical Tab

The **Medical** page provides a summary of any and all medical reports *submitted* by the firm and *reviewed* by the Trust for the individual claim. The Medical page is divided into 5 categories: *Physical Exam/Medical Reports, X-Ray, PFT, Pathology/Autopsy, and CTScan.*

Physical Exams / Medical Reports											
Date	Type	Physician	Facility	Exp	Diagnosis	Caus	Unacceptable	Appr	Conv	Save To File < 1 to 1 of 1 >	
1/1/1999	Physical Exam	(TX1126) *POHL, DAVID F	(NOSCR) NO SCREENING COMPANY	No	Asbestosis	No	No	No	No		

X-Ray											
Date	Physician	Facility	Findings	Caus	ILO	PT	Unacceptable	FilmOk	Appr	Conv	Save To File < 1 to 1 of 1 >
1/1/1999	(0350) *POHL, DOUGLAS A	(NOSCR) NO SCREENING COMPANY	Asbestosis	No	2/2	Yes	No	No	No	No	

PFT																
Date	Physician	Actual	Facility	F.Rpt	Findings	FVC	FEV1	FEV1 / FVC	VC	TLC	RV	DLCO	Unacceptable	Appr	Conv	Save To File < 1 to 1 of 1 >
1/1/1999	(TX9105) *Pohl, James Keller	Yes	(NOSCR) NO SCREENING COMPANY	No		50.00	50.00	50.00	50.00	50.00	50.00	50.00	No	No	No	

Physical Exam/Medical Reports – this section provides detailed information from the medical documents provided to the facility by the firm. The types of documents that are entered in this section include the following: *Physical Exam, Review of Physical, Medical Records and Causation.*

Physical Exams / Medical Reports											
Date	Type	Physician	Facility	Exp	Diagnosis	Caus	Unacceptable	Appr	Conv	Save To File < 1 to 1 of 1 >	
1/1/1999	Physical Exam	(TX1126) *POHL, DAVID F	(NOSCR) NO SCREENING COMPANY	No	Asbestosis	No	No	No	No		

X-Ray – this section provides detailed information from the X-Ray documents provided to the facility by the firm. The types of documents that are entered in this section include the following: *X-Ray B-reader or X-Ray Narrative reports.*

X-Ray											
Date	Physician	Facility	Findings	Caus	ILO	PT	Unacceptable	FilmOk	Appr	Conv	Save To File < 1 to 1 of 1 >
1/1/1999	(0350) *POHL, DOUGLAS A	(NOSCR) NO SCREENING COMPANY	Asbestosis	No	2/2	Yes	No	No	No	No	

PFT (Pulmonary Function Test) – this section provides detailed information from the PFT documents provided to the facility by the firm. The types of documents that are entered in this section include the following: *PFT Report*

PFT																
Date	Physician	Actual	Facility	F.Rpt	Findings	FVC	FEV1	FEV1 / FVC	VC	TLC	RV	DLCO	Unacceptable	Appr	Conv	Save To File < 1 to 1 of 1 >
1/1/1999	(TX9105) *Pohl, James Keller	Yes	(NOSCR) NO SCREENING COMPANY	No		50.00	50.00	50.00	50.00	50.00	50.00	50.00	No	No	No	

Pathology/Autopsy – this section provides detailed information from the Pathology/Autopsy documents provided to the facility by the firm. The types of documents that are entered in this section include the following: *Pathology or Autopsy.*

Pathology/Autopsy											
Date	Physician	Facility	Exp	Findings	Caus	Unacceptable	Appr	Conv	Save To File < 1 to 1 of 1 >		
1/1/1999	(0350) *POHL, DOUGLAS A	(NOSCR) NO SCREENING COMPANY	No	Asbestosis	No	No	No	No			

CTScan – this section provides detailed information from the CTScan documents provided to the facility by the firm. The types of documents that are entered in this section include the following: *CTScan*.

CTScan								Save To File < 1 to 1 of 1 >		
Date	Physician	Facility	Findings	Unacceptable	FilmOk	Appr	Conv			
1/1/1999	(TX6728) *POHL, JOHN MICHAEL	(NOSCR) NO SCREENING COMPANY	Asbestosis		No	No	No			

Deficiency Tab

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

These two types of deficiencies cannot exist on the claim at the same time. Once cleared, the deficiencies are closed and will no longer appear on 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 the claim either medically or for exposure. These types of deficiencies can be cleared by adding the missing claim information or uploading new documents.

General Medical Deficiency Changes									
Release Deficiencies									
There are no items.									
Standard Deficiencies									
Save To File < 1 to 8 of 8 >									
Deficiency Code	Description	Deficiency Date	Notification Date	Date Closed	Source	Status	Last Edit	Last Editor	
003	Injured Party's Social Security Number not Provided	3/26/2009	none	none	B&W	Accepted	3/26/2009	ConsistencyManagerUser	
004	Injured Party's Date of Birth not Provided	3/26/2009	none	none	B&W	Accepted	3/26/2009	ConsistencyManagerUser	
007	Date of Alleged Diagnosis and/or Alleged Injury not Provided	3/26/2009	none	none	B&W	Accepted	3/26/2009	ConsistencyManagerUser	
009	First and Last Dates of Exposure Not Provided	3/26/2009	none	none	B&W	Accepted	3/26/2009	ConsistencyManagerUser	
010	Industry and Occupation not Provided	3/26/2009	none	none	B&W	Accepted	3/26/2009	ConsistencyManagerUser	
014	Attachments not Provided	3/26/2009	none	none	B&W	Accepted	3/26/2009	ConsistencyManagerUser	
120	Medical Report not by a Qualified Physician	3/26/2009	none	none	B&W	Accepted	3/26/2009	mking2	
201	Exposure Information does not Match Claim Form	3/26/2009	none	none	B&W	Accepted	3/26/2009	mking2	

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

General Medical Deficiency Changes									
Release Deficiencies									
Save To File < 1 to 2 of 2 >									
Deficiency Code	Description	Deficiency Date	Notification Date	Date Closed	Source	Status	Last Edit	Last Editor	
R01	Certificate of Official Capacity	10/12/2009	none	none	B&W	Accepted	10/12/2009	wberrioz	
R05	No Death Certificate	10/12/2009	none	none	B&W	Accepted	10/12/2009	wberrioz	
Standard Deficiencies									
There are no items.									

Changes Tab

The **Changes** page provides a history of all edits made to the online claim form. Each edit to the claim form creates a new record in the changes grid.

General Medical Deficiency Changes				
Version	Table	Identifying Info	Date Changed	Reviewed
4	Exposed	Updated smith, john, 888330099, 5/4/1945; Source Trust [B&W]	10/13/2009	No
3	Exposed	Updated smith, john, 888330099, 5/4/1945; Source Trust [B&W]	8/3/2009	Superseded
2	Exposed	Updated smith, john, 888330099, 5/4/1945; Source Trust [B&W]	8/3/2009	Superseded

This grid contains information concerning the edits and will display the following columns: *Version*, *Table*, *Identifying Info*, *Date Changed* and *Reviewed*.

- **Version** – Each and every time an edit is made to a claim form and submitted, Trust Online creates a new version of the claim form data and displays the version number in this column. You may notice that the version always begin with the number 2. This is due to version 1 actually being the *initial claim submission* which is not technically an edit to the claim form.
- **Table** – This column displays the Corresponding Tables for each section of the claim form that was edited. The table listed below shows a detail breakdown of each section of the claim form that may be edited and its corresponding tables.

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 (Initial Upload)	DocumentInfoView
Documents (Documents Received)	DocumentInfo
Finish (Adding Comments)	Exposed

- **Identifying Info** – This column displays the identifying information that is associated with the section of the claim form being edited. For example, when editing the Exposed tables, the identifying info will display the **Claimant's Name, Social Security Number, Date of Birth** and the **Source Trust** that was edited.

Click on this link to view the detailed changes

General Review Deficiency Activity History Changes				
Version	Table	Identifying Info	Date Changed	Reviewed
4	Exposed	Updated Smith, Johnathan, 549742164, 1/1/1944; Source Trust [B&W]	2/12/2009	Superseded

CHANGE DETAILS

Version	Table	Identifying Info	Column/Field	Old Value	New Value	User Name	Date Changed	Reviewed
4	Exposed	Updated Smith, Johnathan, 549742164, 1/1/1944; Source Trust [B&W]	AllegedInjuryDate		1/1/2000 12:00:00 AM	wberrioz	2/12/2009	Superseded
4	Exposed	Updated Smith, Johnathan, 549742164, 1/1/1944; Source Trust [B&W]	AllegedInjury		Level VIII. Mesothelioma	wberrioz	2/12/2009	Superseded
4	Exposed	Updated Smith, Johnathan, 549742164, 1/1/1944; Source Trust [B&W]	BWHasFiledPhysicalExamReport		False	wberrioz	2/12/2009	Superseded

After clicking on the Identifying Info data displayed in the red font, a new window will open showing the actual changes made to the claim form. The window displays all of the information found on the Changes page as well as a few other fields such as **Column/Field**, **Old Value**, **New Value** and **User Name**.

- **Column/Field** – This column displays the actual field that was edited. Some fields' names are obvious and easy to identify, such as the '**AllegedInjuryDate**' and '**AllegedInjury**' seen in the example above, while others may not be so easy to identify, such as the '**BWHasFiledPhysicalExamReport**' also shown in the example above.
 - **Old Value** – This column displays the old existing value, if any, prior to the changes being submitted.
 - **New Value** – This column displays the new edited value that will override any existing old value.
 - **User Name** – This column displays the user name of the individual who made the edits to the claim.
- **Date Changed** – This column displays the date the claim was edited.
 - **Reviewed** – This column displays information concerning whether or not the changes made to the claim form have been reviewed. The following are the possible entries that will be displayed and a brief description of each:
 - **Yes** - all edits to the claim form up to this version have been reviewed by the facility.
 - **No** – these edits and any previously superseded edits have not been reviewed by the facility.
 - **Superseded** – new edits have been made to the claim form and have superseded this version. The user must check the newest version to make sure if these edits have been reviewed.

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

Representation	
Process	<input type="button" value="Next"/> <input type="button" value="Finish"/> <input type="button" value="Edit"/> <input type="button" value="Cancel"/> <input type="button" value="Deficiencies"/> <input type="button" value="Show"/>
1: Injured Party	
2: Injuries	
3: Exposure	
4: Secondary Exp	
5: Litigation	
6: Dependent	
7: Smoking	
8: Economic Loss	
Documents	
Finish Claim	

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.

Choose Trust	
Trust	B&W ▼
<input type="button" value="New Claim"/>	<input type="button" value="Cancel"/>

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** – In this section, the user will enter all asbestos related exposure by clicking the <**Add Exposure**> button. Once an exposure is added, the user must click the <**Save**> button in order to save the newly added exposure. Repeat this process for each additional exposure record.
- **Secondary Exposure** – From this section, the user can enter any and all second hand or bystander exposure. For each secondary exposure record, an Exposure record must be completed for the occupationally exposed person. *Claimant must seek Individual Review of his or her claim.*
- **Litigation** – From this section, the user will enter all asbestos related litigation by clicking the <**Add Litigation**> button. Once the litigation is added, the user must click the <**Save**> button in order to save the newly added litigation. Repeat this process for each additional litigation record. *Must be completed for IR claims.*
- **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 3 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**

Except for the Payment Extract and Claims Under Edit reports, firms can create reports in one of the following formats: *CSV*, *EXCEL* or *PDF*. The **Payment Extract** and **Claims Under Edit** can only be created as an Exported CSV file.

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

Report Type:

Detail

Summary

Output Type:

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:

Detail

Summary

Deficiency Count

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, Last Name, First Name, 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	B&W	Output Type:	PDF
Create Report			
Status	Attorney		
All Ready to Review Ready to Re-Review	All 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.

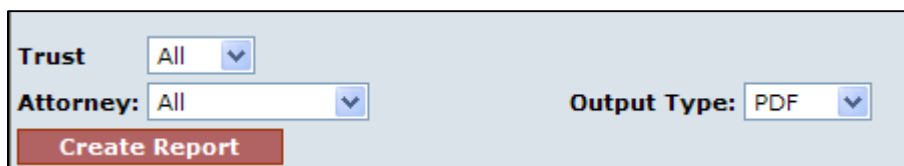
- **Status**– This list box includes the following types of statuses that can be selected: *All, Ready to Review, and Ready to Re-review.*
- **Attorney** – This list box includes the entire list of attorneys the user has access to. You may select “All” or one more of the attorneys listed.
- **Output 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 #, Injury, (Process) Option, Injured, SSN, PIQ, Received (Date)* and grouped by *Status.*

Claim Status by Trust

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

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



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

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

After entering the criteria, click the <**Create Report**> button. A message box will appear prompting the user to *Open, Save or Cancel.* The report provides the following information; *Claim #, Full Name, 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.

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, Firm Name, Attorney Last Name, Attorney First Name, Attorney Middle Initial, Claim Number, Last 4 SSN, Claimant Last Name, Claimant First Name, Claimant Middle Initial, Payment Date, Principal Amount and Sequence Adjustment Amount*.

Claims Under Edit

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

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

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

- **Trust** – This drop-down includes all of the Trust(s) the user has access to.

- **Attorney** – This list box includes the entire list of attorneys the user has access to. You may select “All” or one or more of the attorneys listed.
- **Days Under Edit** – This field allows the user to specify the number of days the claims is being edited.

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

Chapter 4 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, RCPPAIDAF, etc.)
 - Deferral Letters - (60 days out)

Firm Level Notifications

Firm Level notifications refer only to the **Payment Notifications** and can only be changed by the Facility. The firm must contact the facility to authorize their staff users to receive the email notification when payments are made.

When payments are made, the facility will send an email notifying each authorized user to proceed to the Notifications page of Trust Online. The Firm Notifications is displayed in the bottom section of this page and includes the following information; *Document (id), Type, Report Date, Notified Date, Comment, Trust, Source Firm and Printed Status.*

Firm Notifications								
Document	Type	Attorney	Report Date	Notified Date	Comment	Trust	Source Firm	Printed Status
1727174	Payment Notification		1/8/2008	1/9/2008	Payment Notification	B&W	AD WESTBROOK LLC	Mark Printed
1534817	Payment Notification		11/30/2007	12/5/2007	Payment Notification	B&W	AD WESTBROOK LLC	Mark Printed
1438247	Payment Notification		11/16/2007	11/27/2007	Payment Notification	B&W	AD WESTBROOK LLC	Mark Printed
1366757	Payment Notification		11/2/2007	11/9/2007	Payment Notification	B&W	AD WESTBROOK LLC	Mark Printed
1320520	Payment Notification		10/24/2007	11/2/2007	Payment Notification	B&W	AD WESTBROOK LLC	Mark Printed

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



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

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

Document	Type	Attorney	Report Date	Notified Date	Comment	Trust	Source Firm	Printed Status
1727174	Payment Notification		1/8/2008	1/9/2008	Payment Notification	B&W	AD WESTBROOK LLC	demo printed at: 10/22/2009 10:28 AM

Even after clicking this button, user(s) can still re-print the document by clicking the Document id.

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
1809774	Deferred Activity Notification	Smith, Robert	3/8/2012	3/8/2012	Deferred Claims - 60 days out Notification	B&W	Acme Law	Mark Printed
1809310	Intake/Review Deficiency Notification	Yousefi, Pouya	10/25/2011	10/25/2011	Intake Deficiency Notification	FB	Acme Law	Mark Printed
1809302	Intake/Review Deficiency Notification	Smith, Robert	10/25/2011	10/25/2011	Intake Deficiency Notification	FB	Acme Law	Mark Printed
1809264	Intake/Review Deficiency Notification	Smith, Robert	10/25/2011	10/25/2011	Review Deficiency Notification	OC	Acme Law	Mark Printed
1808934	Intake/Review Deficiency Notification	Yousefi, Pouya	10/25/2011	10/25/2011	Intake Deficiency Notification	OC	Acme Law	Mark Printed
1808920	Intake/Review Deficiency Notification	Smith, Robert	10/25/2011	10/25/2011	Intake Deficiency Notification	OC	Acme Law	Mark Printed
1808623	Offer Notification	Yousefi, Pouya	10/25/2011	10/25/2011	Release Notification	B&W	Acme Law	Mark Printed
1808007	Reciprocal Activity Notification	Smith, Robert	6/16/2011	6/16/2011	Reciprocal Claim Paid Exists Notification	B&W	Acme Law	Mark Printed

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

See
Previous
Page
Image

You may also limit the number of notifications that appear by selecting one of the types from the Notification Type drop-down box and clicking the **<Search>** button. In this example, the user selected "Offer Notifications". The new results now only display two documents.

Document	Type	Attorney	Report Date	Notified Date	Comment	Trust	Source Firm	Printed Status
1790170	Offer Notification	Smith, Robert	8/5/2009	8/5/2009	Release Notification	B&W	Acme Law	Mark Printed
1789486	Offer Notification	Smith, Robert	6/15/2009	6/15/2009	Release Notification	B&W	Acme Law	Mark Printed

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



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

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

Document	Type	Attorney	Report Date	Notified Date	Comment	Trust	Source Firm	Printed Status
1790170	Offer Notification	Smith, Robert	8/5/2009	8/5/2009	Release Notification	B&W	Acme Law	staffaccount printed at: 10/22/2009 11:46 AM

Even after clicking this button, user(s) can still re-print the document by clicking the Document id.

Chapter 5 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, 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 taking into consideration a number of factors with the objective of expediting 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 Conversion tab on the top menu bar. From this page, you will need to select the Target Trust from the drop-down.

The screenshot shows the 'Conversion' tab selected in the top navigation bar. Below the navigation bar, there is a 'Target Trust' dropdown menu with a list of trust abbreviations: AWI, B&W, FB, FER (highlighted), FLX, OC, T&N, and USG. To the right of the dropdown is the text '(Convert claim/s to this Trust)'. Below this, there are several search fields: 'Last Name' with a text input box, 'SSN' with a text input box, 'Claim Number' with a text input box, and 'Firm File Number' with a text input box. To the right of these fields is an 'Attorney' dropdown menu with 'All' and 'Smith, Robert' as options. At the bottom right, there is a 'Deficiency Count' dropdown menu with 'All' as the selected option.

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, SSN, Claim Number, Firm File Number, Attorney and/or Deficiency Count.*

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.


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

Save To File < 1 to 15 of 33 >													
Name	SSN	Firm File #	DOB	Claim #	Status	Injury	Confirmed Injury Date	Option	Release Amount	Paid Amount	Attorney	Deficiency Count	Source Trust
Belmosa, FRANK	*****7009		11/29/1935	12487998	Review Deficient	Non-Confirmed		Expedited	\$0.00	\$0.00	SMITH	8	FB
Braune, Salvador	*****8552		8/10/1944	6522220	Ready to Review	Level II. Asbestosis/Pleural Disease		Expedited	\$0.00	\$0.00	SMITH	0	USG
Cropsey, Louis	*****6246		12/16/1956	12549315	Ready to Review	Level II. Asbestosis/Pleural Disease		Expedited	\$0.00	\$0.00	SMITH	0	FB
Debock, ASBERRY	*****0996		9/24/1943	1010893	Paid	Bilateral Pleural Disease	1/13/1996	IRC	\$500.00	\$0.00	SMITH	0	CEL


The information displayed includes *Name*, *SSN*, *Firm File #*, *DOB*, *Claim #*, *Status*, *Injury*, *Confirmed Injury Date*, *Option*, *Release Amount*, *Paid 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 *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 FB Trust button on the second line.

Abdelal, Sylvester	*****8609	1/17/1923	12367543	Review Complete	Level VII. Lung Cancer 1	9/29/2011	Expedited	\$0.00	\$0.00	RAICHL	0	 FB
--------------------	-----------	-----------	----------	-----------------	--------------------------	-----------	-----------	--------	--------	--------	---	--

After clicking this button, the system chose the USG claim rather than the FB claim to convert to the new trust B&W. 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 USG Data to B&W?


Link these claims (Claim has an open release.)

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 FB Data to B&W?

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 new 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.

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

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.*

USG
 AWI
 OC
 FB

[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.

B&W #: 2211333	Name: smith, john	DOB: 5/4/1945	Deceased/DOD: No,(none)	Status: Ready to Re-Review
	SSN: 888330099	Firm File#: (none)	Lit Date: (none)	Queue: Re-Review Queue
	Option: Expedited	Alleged Injury: Level II. Asbestosis/Pleural Disease		Confirmed Injury: (none)
	Received: 8/1/2009	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 will open that particular claim in a new window.

Linked Claims		
Save To File < 1 to 4 of 4 >		
Trust	Claim Number	Status
B&W	2211333	Ready to Review
USG	6132382	Ready to Review
AWI	10131666	Ready to Review
FB	12127098	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.

<input checked="" type="checkbox"/> USG; 6132382; Ready to Review <input checked="" type="checkbox"/> AWI; 10131666; Ready to Review <input type="checkbox"/> OC; 11157094; Ready to Review <input type="checkbox"/> FB; 12127098; Ready to Review
<div style="display: flex; justify-content: space-around;"> Submit Claim Cancel </div>

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 OC and FB 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
USG	6132382	Ready to Review	FB	12127098	6/3/2010
AWI	10131666	Ready to Review	OC	11157094	6/3/2010

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 you change this information on any of the linked claims, it will go 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* – The information provided in this section is shared across all Trust and do not have to be edited individually.
-  *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 B&W or any other asbestos defendant in the tort system prior to the Petition Date (February 22, 2000) 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)*
 - *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.