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 activities, such as Offers and Payments, and are grouped into two different levels:

- **Firm Level**
  - Payments
- **Attorney Level**
  - Offers
  - Release Deficiencies
  - Intake/Review Deficiencies
  - Activities (Duplicate Claims, Prepetition, etc.)
    - Prepetition Letters – (PREPETITN, PREPETITN2, etc.)
    - Duplicate Claim Letters – (Different Attorney, Same Attorney)
    - Deferral Letters – (60 days out)
    - Not Ready – (Not Ready Claims)

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. 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 the HAL and HW Trust from the drop-down. 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
10233630	Payment Notification		2/11/2017	4/13/2017	Payment Notification	HAL	Acme Law	Mark Printed
10232209	Payment Notification		12/21/2016	1/5/2017	Payment Notification	HAL	Acme Law	Mark Printed
10209421	Payment Notification		2/24/2016	7/6/2016	Payment Notification	HAL	Acme Law	Mark Printed
10209308	Payment Notification		2/11/2016	7/6/2016	Payment Notification	HAL	Acme Law	Mark Printed
10184742	Payment Notification		1/30/2015	2/12/2015	Payment Notification	HAL	Acme Law	Mark Printed
10172930	Payment Notification		7/21/2014	2/12/2015	Payment Notification	HAL	Acme Law	Mark Printed

Firm Notifications

Start　　　End　　　Search

Save To File | Show All < 1 to 15 of 85 >

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 below)*
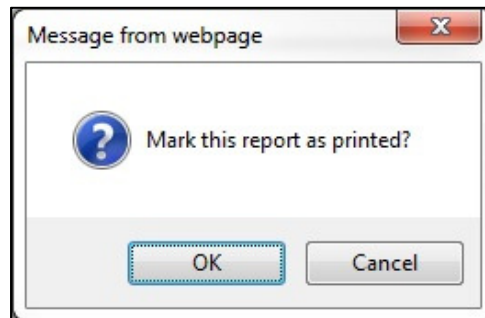
The Firm Notifications is displayed in the bottom section of the Notifications page and includes the following information; *Document* (id), *Type*, *Report Date*, *Notified Date*, *Comment*, *Trust*, *Source Firm* and *Printed Status*.
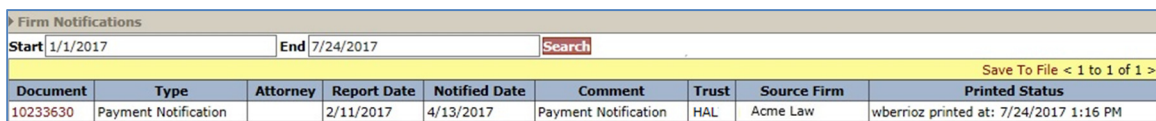

To view the notification document(s), click on the Document number which acts as a hyperlink. Once the PDF document is opened, the user may save or print it. The "**Print Status**" column provides the user with a button labeled <**Mark Printed**>.

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

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

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 needed.

The payment notifications permissions can only be controlled and updated by an administrator at the Facility. For firm users 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 a Trust Online Attorney account.

For more information on how to set up these notifications, see *DIIA Trust Online User Manual Chap 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*.
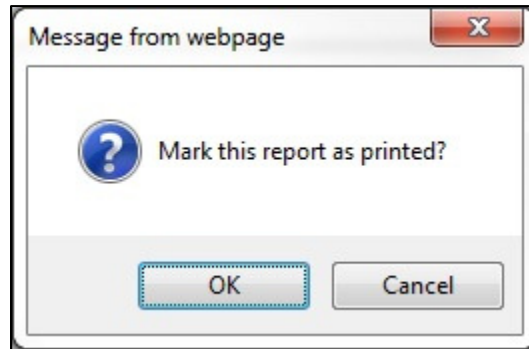
Document	Type	Attorney	Report Date	Notified Date	Comment	Trust	Source Firm	Printed Status
10239315	Intake/Review Deficiency Notification	SMITH, JOHN	8/5/2017	8/5/2017	Intake Deficiency Notification	HAL	Acme Law	Mark Printed
10215068	Duplicate Claim Activity Notification	SMITH, JOHN	5/23/2016	5/23/2016	Duplicate Claim Same Attorney Notification	HAL	Acme Law	Mark Printed
10215105	Intake/Review Deficiency Notification	SMITH, JOHN	5/23/2016	5/23/2016	Intake Deficiency Notification	HAL	Acme Law	Mark Printed
10229472	Intake/Review Deficiency Notification	SMITH, JOHN	9/3/2016	9/3/2016	Intake Deficiency Notification	HAL	Acme Law	Mark Printed
10215164	Intake/Review Deficiency Notification	Smith, Robert	5/23/2016	5/23/2016	Intake Deficiency Notification	HAL	Acme Law	Mark Printed
10215067	Duplicate Claim Activity Notification	Smith, Robert	5/23/2016	5/23/2016	Duplicate Claim Same Attorney Notification	HAL	Acme Law	Mark Printed
10215059	Duplicate Claim Activity Notification	Smith, Robert	5/23/2016	5/23/2016	Duplicate Claim Different Attorney Notification	HAL	Acme Law	Mark Printed
10239350	Intake/Review Deficiency Notification	Smith, Robert	8/5/2017	8/5/2017	Intake Deficiency Notification	HAL	Acme Law	Mark Printed
10241025	Intake/Review Deficiency Notification	Smith, Robert	9/23/2017	9/23/2017	Intake Deficiency Notification	HAL	Acme Law	Mark Printed
10237889	Intake/Review Deficiency Notification	Smith, Robert	7/8/2017	7/8/2017	Intake Deficiency Notification	HAL	Acme Law	Mark Printed

Notification Type: All | *Start* | *End* | Search | Save To File | Show All < 1 to 15 of 99 >

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

You may also 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 Intake/Review 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 filters.

Notification Type: Intake/Review Deficiency Notification | *Start* 7/1/2017 | *End* 2/22/2018 | Search | Save To File < 1 to 5 of 5 >

Document	Type	Attorney	Report Date	Notified Date	Comment	Trust	Source Firm	Printed Status
10241031	Intake/Review Deficiency Notification	Smith, Robert	9/30/2017	9/30/2017	Intake Deficiency Notification	HAL	Acme Law	Mark Printed
10241025	Intake/Review Deficiency Notification	Smith, Robert	9/23/2017	9/23/2017	Intake Deficiency Notification	HAL	Acme Law	Mark Printed
10239350	Intake/Review Deficiency Notification	Smith, Robert	8/5/2017	8/5/2017	Intake Deficiency Notification	HAL	Acme Law	Mark Printed
10239315	Intake/Review Deficiency Notification	SMITH, JOHN	8/5/2017	8/5/2017	Intake Deficiency Notification	HAL	Acme Law	Mark Printed
10237889	Intake/Review Deficiency Notification	Smith, Robert	7/8/2017	7/8/2017	Intake Deficiency Notification	HAL	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
10241031	Intake/Review Deficiency Notification	Smith, Robert	9/30/2017	9/30/2017	Intake Deficiency Notification	HAL	Acme Law	firm super user printed at: 2/22/2018 9:49 AM
10241025	Intake/Review Deficiency Notification	Smith, Robert	9/23/2017	9/23/2017	Intake Deficiency Notification	HAL	Acme Law	Mark Printed

Attorney Notifications
Notification Type Intake/Review Deficiency Notification | Start 7/1/2017 | End 2/22/2018 | Search
Save To File < 1 to 5 of 5 >

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.

* 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 web support department at 866.665.5790.