Uploading Documents to Existing Claims
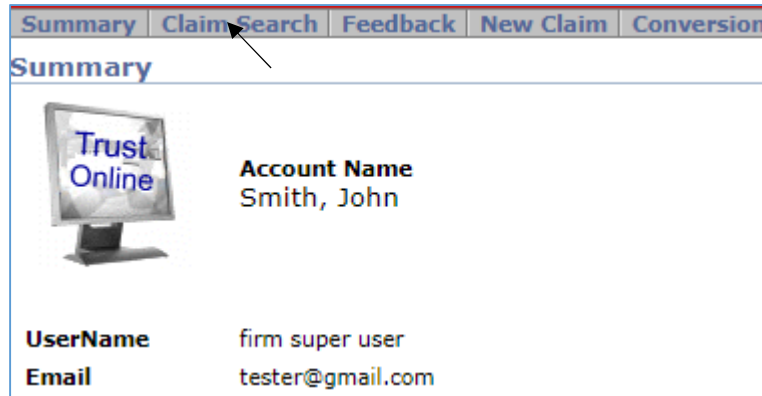
Find the Claim

➢ From the Summary page, click on the Claim Search link on the top menu bar:

Summary	Claim Search	Feedback	New Claim	Conversion

Summary

Trust Online

Account Name
Smith, John

UserName   firm super user
Email   tester@gmail.com

➢ On the Claim Search page, enter the claim criteria and click on the
<**Search**> button.

Claim Search

| Last Name | | Claim Number | |
Last 4 SSN		Firm File Number	
		Deficiency Count	All ▾
		Pending Paperwork	▾

➢ From the Search grid, click on the Claimants name to open the individual
summary page. (*note – The claim will open in a new window and each
subsequent click on the claimant's name will open another new window*)

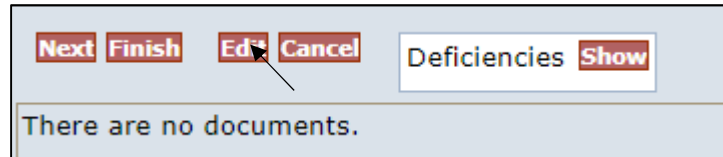| Name	SSN	Trust	Attorney	Status
Doe, John	*****4815	HAL	SMITH	Intake Deficient

➢ Maximize new window (*if necessary*) to view entire claim summary page –
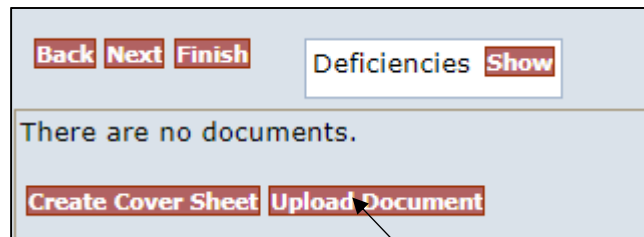General Tab.

Instructions on Uploading Documents

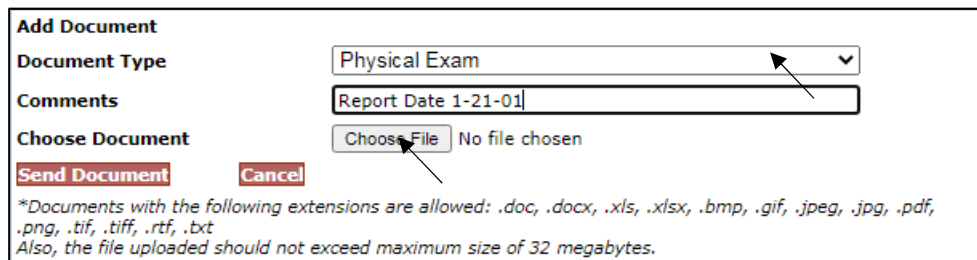1. From the General tab, click on the < **Document**> button.

General	Deficiency	Changes
Claim Form	**Documents**	**Print Claim Form**
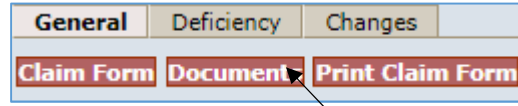
2. Click on the <**Edit**> button. (*note – the user's full name will be displayed in the '**Being Edited by:**' section*)

Next **Finish**   **Edit** **Cancel**   Deficiencies **Show**

There are no documents.

3. Click on the <**Upload Document**> button.

Back **Next** **Finish**   Deficiencies **Show**

There are no documents.

Create Cover Sheet **Upload Document**

4. Select the type of document from the Document Type drop-down box, and enter any necessary comments.

Add Document

Document Type	Physical Exam
Comments	Report Date 1-21-01
Choose Document	Choose File No file chosen

Send Document   **Cancel**

Documents with the following extensions are allowed: .doc, .docx, .xls, .xlsx, .bmp, .gif, .jpeg, .jpg, .pdf, .png, .tif, .tiff, .rtf, .txt
Also, the file uploaded should not exceed maximum size of 32 megabytes.

Note: *When uploading several documents of the same type, it is advisable to add a comment to differentiate between documents of the same type. This will also facilitate the review process*.

Document ID	Document Type	Comment
10264586	Physical Exam	Report Date 1-15-97
10264585	Physical Exam	Report Date 1-21-01

5. Click on the <**Choose File**> button.

6. From the Choose file box, select the document to be uploaded and click on the <**Open**> button.
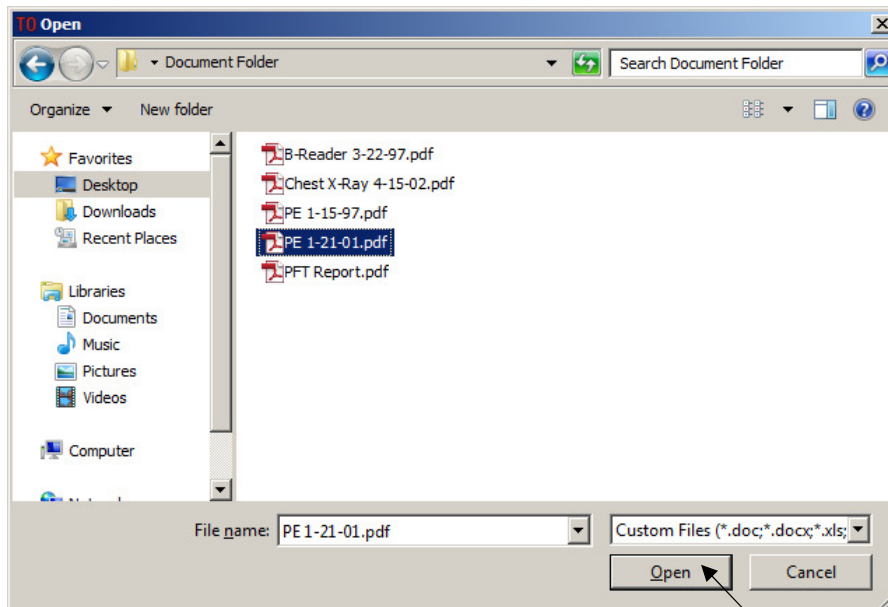
7. Click on the <**Send Document**> button once the Choose Document field has been populated with the physical address of the document.

8. The uploaded document creates a record which includes Document ID, Document Type, Comment, Received (date), Edited By, Edited, Created By and Created (date). The last field displays a yellow pencil (*to edit*), a printer icon (*to print*) and a blue arrow (*to re-upload*).

								Save To File < 1 to 1 of 1 >
Document ID	**Document Type**	**Comment**	**Received**	**Edited By**	**Edited**	**Created By**	**Created**	
10264588	Physical Exam	Report Date 1-21-01		firm super user	10/22/2020	firm super user	10/22/2020	🖉 🖨 ⬆

9. After uploading the documents, proceed to the Finish page by either clicking on the <**Finish**> button or the **Finish Claim** tab located on the left side menu bar.

   At the Finish page, you <u>must</u> complete the electronic submission of the supporting documents by clicking on the <**Submit Claim**> button.

   - **Note**: If after uploading the documents, the user times out or closes out of the claim without proceeding to the Finish page, the claim will still appear to be edited by the last user and the Trust will not be able to continue with the Review process of the claim.