

Trust Online Conversion & Linking

Note: The DIIA Trust which consists of the HAL and HW entities can only be converted and linked between the two entities. They cannot be linked to, converted to, or be converted from any other Trust on Trust Online.

Conversion & Linking

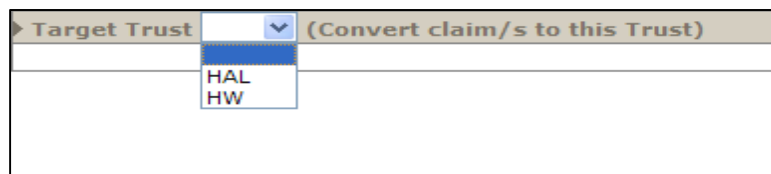
Trust Online has created a method that allows the conversion and linking of claims for the purpose of sharing data. The conversion process takes existing *claim* and *review data* from one Trust (**Source Claim**) and imports this data into a new claim for another Trust (**Target Claim**). The linking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

The Source Claim used in the conversion process can be any claim previously submitted to either HAL or HW 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

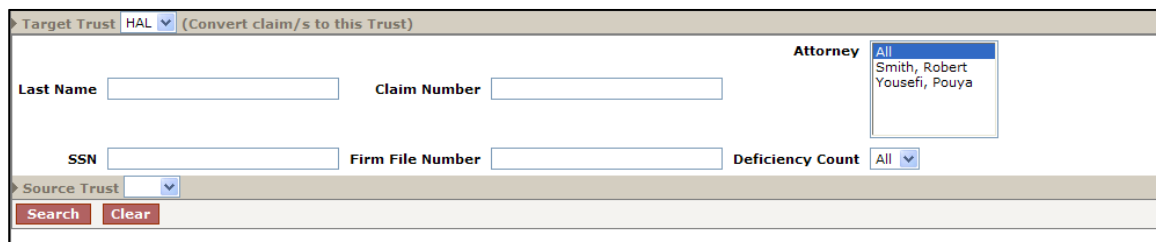
The conversion process limits the amount of time needed to submit an entirely new claim. By using the conversion process, information that was previously entered during the Review decision as well as information submitted by the law firm for the Source Claim will carry across to the new Target Claim.

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.



A screenshot of a web form showing a dropdown menu for 'Target Trust'. The dropdown is open, displaying two options: 'HAL' and 'HW'. The text '(Convert claim/s to this Trust)' is visible to the right of the dropdown.

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*.



A screenshot of a search form for source claims. The form includes a 'Target Trust' dropdown menu set to 'HAL'. Below this are several search fields: 'Last Name', 'Claim Number', 'SSN', 'Firm File Number', and 'Deficiency Count'. There is also an 'Attorney' dropdown menu with a list of names: 'All', 'Smith, Robert', and 'Yousefi, Pouya'. At the bottom of the form are 'Search' and 'Clear' buttons.

Users may also search for a list of claims to convert by selecting either the HAL or HW 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 Option*.

Source Trust: HW

Status Code: All
Awaiting Quality Assurance
Deemed Withdrawn
Deferred

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

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

Claim Option: All

Search Clear

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

Name	SSN	Firm File #	DOB	Claim #	Status	Alleged Injury	Confirmed Injury	Confirmed Injury Date	Option	Release Amount	Paid Amount	Attorney	Deficiency Count	Deficiency Codes	Source Trust	Target Trust
Smith, John	*****4129		6/22/1944	5043381	Intake Deficient	Level VIII. Mesothelioma			Expedited	0	0	Smith	5	014, 025, 203, 229, 277	HW	HAL
Smith, Will	*****0705		1/2/1935	5043026	Intake Deficient	Level IV. Severe Asbestosis			Expedited	0	0	Yousefi	1	014	HW	HAL
Smith, John	*****5469		11/2/1942	5042926	Intake Deficient	Level III. Asbestosis/Pleural Disease			Expedited	0	0	Smith	2	014, 025	HW	HAL

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

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

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

Ok

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

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

Source Trust	HW	Status	Intake Deficient
Name	Smith, John	Alleged Injury	Level VIII. Mesothelioma
SSN	5947554129	Evaluated Injury	(none)
Date of Birth	6/22/1944	Gross Settlement Value	\$0.00
Claim Number	5043381	Offer Amount	\$0.00

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

Review Results

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

Deficiencies	
Save To File < 1 to 5 of 5 >	
Deficiency Code	Description
130	Medical Report not Provided
140	Chest X-ray Report Not Provided
203	Industry not Provided
229	Exposure is all Post 1982
277	Site Code

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

Warnings	
Save To File < 1 to 3 of 3 >	
Id	Warning
W014	Attachments not Provided
W025	Indirect Claim Information
WA-DUPECLAIM Claim appears to be a duplicate to another claim in the HAL database and requires research by the Trust.	

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

Documents			
Save To File < 1 to 3 of 3 >			
Document ID	Document Type	Comment	Received
1789398	Release		5/7/2009
1788434	Physical Exam		2/17/2009
1788433	Other		2/12/2009

At the bottom of the page, the user has the option to Link the source trust claim to the newly converted target trust claim. The "Link these claims" box will be automatically checked. If these claim are not to be linked, uncheck the box and click the <Yes> button to proceed.

Do you want to submit this HW Data to HAL?	
<input checked="" type="checkbox"/>	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 update the new claim with any Trust specific information prior to submitting it.

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

Do you want to submit this HW Data to HAL?

Link these claims (Claim is already linked to this trust.)

Yes No, enter alternate data.

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 be converted to a new claim within the same trust. This feature will allow firms to covert information from a withdrawn claim to a new claim rather than submitting a new claim manually.
- **Previously Deemed Withdrawn Claims** – a claim that was deemed withdrawn can be converted to a new claim within the same trust. This feature will allow firms to convert information from a deemed 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 can also be implemented when entering a brand new claim using the "New Claim" tab. For example, prior to submitting the new HAL claim, the user will have the option to create a new HW claim and have it linked to the HAL claim by clicking on the check box on the Finish page.

Finish Claim

Comments: [Add Comment](#)



If you intend to submit this information for both Halliburton and Harbison-Walker, please check the box below. This will link the claims, and updates to either claim will be automatically applied to the other. Claims do not need to be linked and can be unlinked at any time.

* 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.

HW

[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 is a linked-claim associated with this particular claim.

	HAL #: 4042840	Name: smith, john	DOB: 6/22/1945	Deceased/DOD: No,(none)	Status: Hold
		SSN: 456785154	Firm File#: (none)	Lit Date: (none)	Queue: Awaiting Document Tank
		Option: Expedited	Alleged Injury: Level IV. Severe Asbestosis		Confirmed Injury: (none)
		Received: 7/1/2010	Firm: Acme Law		

Furthermore, at the bottom of the General Page, there is a Linked Claims section that displays the claim that is linked and its 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 1 of 1 >		
Trust	Claim Number	Status
HW	5043381	Intake Deficient

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, the claims will automatically become unlinked.

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

<input type="checkbox"/> HW; 5043381; Intake Deficient
Submit Claim Cancel

Once the edits have been submitted, the claims will no longer be linked and an Unlinked Claims section will now be displayed on the General Page and will provide the user with the Trust, Claim Number and the Date the claim was unlinked.

Unlinked Claims		
Save To File < 1 to 1 of 1 >		
Trust	Claim Number	Date
HW	5043381	8/3/2010


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 linked set, the user is in fact editing both of the claims in the linked set.


Although the linking process does eliminate much of the time needed to update both 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 the sections of the claim and briefly point out the pages and individual fields that carry across to the linked claim as well as those that don't.

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 both Trust and do not have to be edited individually (if you change this information on either the HAL or HW claim form, it will go across to the linked side of the claim):


- **Representation**

-  *Representation Page* – The information provided on this page is shared across both entities.

- **Process**

- *Process* – The claim process option will need to be edited on a claim by claim basis. This data is only shared across the linked claim during initial claim submission.
 - *Indirect Claim* – The Indirect Claim question 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 on this page is shared across both entities.

- **2: Injuries**


- *Injuries* – The information provided on this page is shared across both entities except for the last question on the page that asks “For claims filed against Halliburton or Harbison-Walker entity, or any other asbestos defendant in the tort system prior to the DII Petition Date (December 16, 2003), please check this box if you have filed a physical examination report...”. This field will need to be edited on a claim by claim basis. This field is only linked during initial claim submission.


- **3: Exposure**


- *3.1 Site/Plant Section* – All of the fields in this first section are shared across both entities, except for the following fields that will need to be edited on a claim by claim basis:
 - [Trust] Specific Code
-  *3.6 Exposure Details Section* – The information provided in this section is shared across both entities.
-  *3.7 DIIA Employee Section* – The information provided in this section is shared across both entities.
-  *3.8 Occupational Exposed Section* – The information provided in this section is shared across both entities.


- **4: Secondary Exposure**
 - *4: Secondary Exposure* – All of the fields in this section are shared across both entities, 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**
 - *5.1 Asbestos Litigation* – All of the fields in this section are shared across trust, except for the following fields that will need to be edited on a claim by claim basis:
 - *5.3 Jurisdiction* – This section of the Litigation page will need to be edited on a claim by claim basis.
 - *5.4 Tolling Agreement* – This section of the Litigation page will need to be edited on a claim by claim basis.

- **6: Dependent**
 -  *Dependent*– The information provided on this page is shared across both entities.

- **7: Smoking**
 -  *Smoking* – The information provided on this page is shared across both entities.

- **8: Economic Loss**
 -  *Economic Loss*– The information provided on this page is shared across both entities.

- **9: Extraordinary Claims**
 -  *Extraordinary Claims*– The information provided on this page is shared across both entities.

- **Documents**
 -  *Documents* – Documents submitted on one of the linked claims will be shared across both entities.