

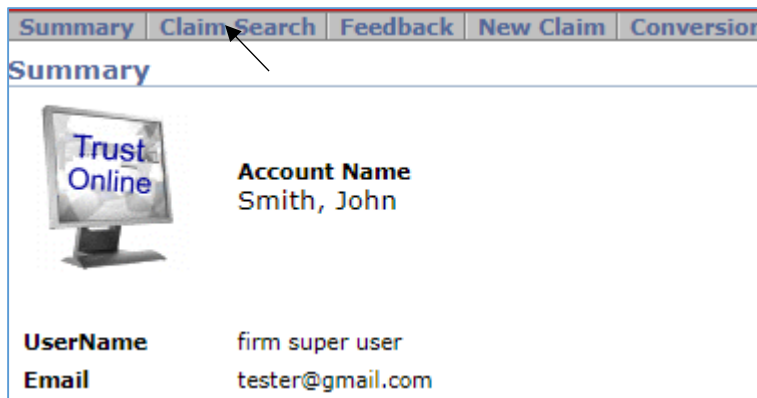
Faxing Documents to Existing Claims

Requirements

1. Must allow pop-ups from Trust Online or disabled pop-up blocker.
2. Adobe Reader or similar PDF reader.
3. Local or Network Printer.

Find the Claim

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



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

Claim Search			
Last Name	<input type="text"/>	Claim Number	<input type="text"/>
Last 4 SSN	<input type="text"/>	Firm File Number	<input type="text"/>
		Deficiency Count	All ▼
		Pending Paperwork	▼

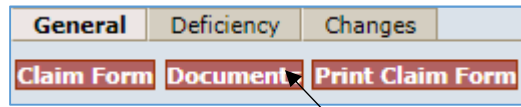
- From the Search grid, click on the Claimants name to open the individual summary page. (note – The claim will open in a new window and each subsequent click on the claimant’s name will open another new window)

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

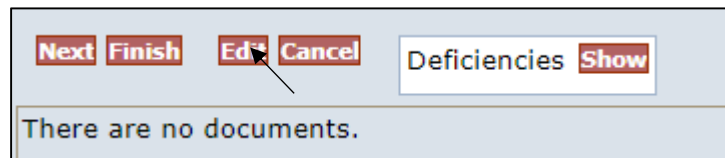
- Maximize new window (if necessary) to view entire claim summary page – General Tab.

Instructions on Faxing Documents

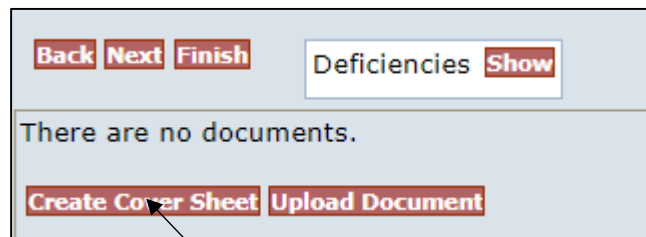
1. From the General tab, click on the < **Document**> button.



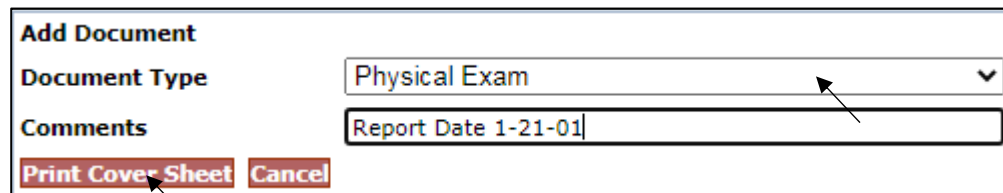
2. Click on the < **Edit**> button. (*note – the user's full name will be displayed in the 'Being Edited by:' section*)



3. Click on the < **Create Cover Sheet**> button.



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



A screenshot of a form titled 'Add Document'. It has a 'Document Type' dropdown menu with 'Physical Exam' selected. Below it is a 'Comments' text box containing 'Report Date 1-21-01'. At the bottom are two buttons: 'Print Cover Sheet' and 'Cancel'. Arrows point to the 'Document Type' dropdown and the 'Print Cover Sheet' button.

Note: When faxing 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. Preview the cover sheet for accuracy and print it.
6. Attach the document to the cover sheet and fax it to the number at the top of the cover sheet. (*note – you may fax multiple documents using multiple cover sheets*)

7. The newly created fax cover sheet 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 upload*).
8. Note that the Received field will not be populated with the date received until the faxed document has been received and attached to the Trust Online claim.

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 creating the fax cover sheet(s), 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 must 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.