R38 TO Enhancements 6/17/2010

# **R38 Trust Online Enhancements**

The following enhancements to Trust Online are tentatively scheduled for *Thursday, June*  $17^{th}$ , 2010:

## 1. New "Call-In" Passkey

As an added security feature, a new Call-In Passkey has been implemented to protect the confidentiality of your firm's claim inventory. This passkey is provided for firms that <u>call</u> in to the Facility for claim information and can be located on the General Page of each claim.



Only one Passkey is assigned to each firm and can only be edited by the Firm Super User, in their profile page. Editing this field in the profile page will change the Firm Passkey for the firm. This passkey must be at least 7 characters long and contain at least 1 letter and 1 number.

**NOTE**: Starting **July 1, 2010**, all Firms must provide the Facility with this new "Call-In Passkey" whenever inquiring about any claim information, such as the status of the claim or questions about specific deficiency codes. The Facility can not provide callers with any information if they can not provide this Passkey.

#### 2. Claim Search Results UPDATES

The Claim Search results grid has been updated to include the **<u>Date Received</u>** field. This field will only appear when the "Extended" and "Export All to File" Results View has been selected.



This field will also be available when using the "Save to File" link to export the data to a spreadsheet.

## 3. New Payment Extract Report

A new "Payment Extract" report has been added to the Reports page on Trust Online. This new report will permit users to run payment reports for a specific Trust and Attorney. The user can also filter the reports by date ranges.

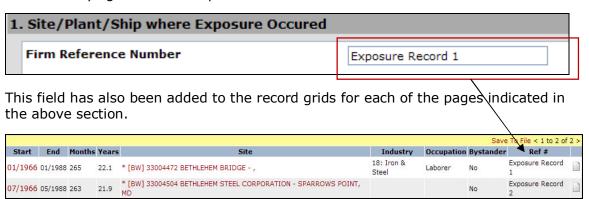
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Note: This data will be exported as a .csv file.

#### 4. Firm Reference Numbers

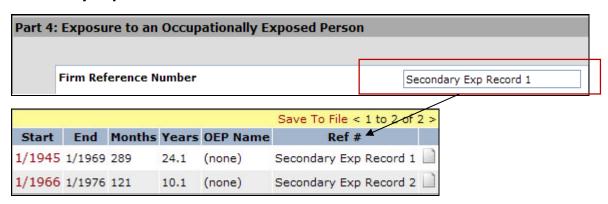
In response to requests from firm users, a new Firm Reference Number field has been added to the *Exposure*, *Secondary Exposure*, *Litigation* and *Dependents* pages. For every record entered in these sections, there will be a field where the firms can enter identifying information specific to each record.



This field will accept up to 50 characters and can be a combination of numbers and letters.

The following are images of the Pages and Grids that have been updated with the new Firm Reference Number field.

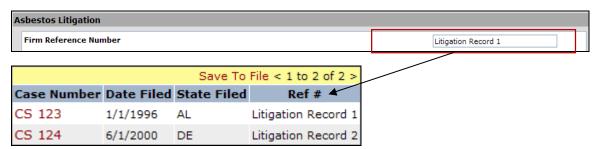
### Secondary Exposure & Grid



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**NOTE:** This field is for internal firm use only. This update will not move the claim or affect the claim status in Trust Online.

# **Litigation Page & Grid**



## **Dependent Page & Grid**

