

Section 4 Notification

Trust Online has provided a newly innovated method of notifying law firms with updated information about their claims. Notifications are provided for **Intake/Review Deficiencies, Release Deficiencies, Offers, and Payments.**

Notifications are broken down into two levels: **Attorney** and **Firm.**

The following sections will provide a detailed explanation concerning each of these levels, how to set the notification preferences and the users who have access to view these notifications.

4.1 Firm Notifications

4.1.1 Firm Level

Payment Notifications are Firm Level Notifications and can only be viewed by the Firm Administrator and the person designated by the Firm Administrator to receive the email notification.

The individual designated to receive the email notification must have a Trust Online **Staff** or **Attorney** account and also an active email address included in his/her profile.

4.1.2 Setting Firm Notification Option

The Firm Administrator can view the **Payment Option** specified for the firm on his/her **Profile** page. The options are **Paper Check** or **Electronic**. If Electronic is checked, the name of the designated account will be populated in the drop-down box under Payment Options. See **Figure 23**

The screenshot shows a form for editing a firm's profile. It includes fields for Account Name, Account Type, Email, User ID, Last Name, First Name, Email, Password, and Confirm Password. Below these fields are the Payment Options, which include radio buttons for Paper Check and Electronic. The Electronic option is selected, and a drop-down menu shows 'King, Mark (fsu10)'. At the bottom are Save and Cancel buttons.

Account Name	Joseph Smith
Account Type	FirmSuperUser
Email	jsmith@acme.com
User ID	jsmith
Last Name	* <input type="text" value="Smith"/>
First Name	* <input type="text" value="Joseph"/>
Email	* <input type="text" value="jsmith@acme.com"/>
Password	<input type="text"/>
Confirm Password	<input type="text"/>

Payment Options

Paper Check

Electronic

FIGURE 23

To receive electronic payments and notifications, the Firm must first complete an ACH form and designate an email address of the user they wish to be notified when payments are made.

4.1.3 Access To View Payment Notifications Online

When the Trust issues payments to a Firm that has selected Electronic as their Payment Option, an email is sent to the Firm Administrator and the user who is designated by the ACH form to receive such notifications.

These emails do not contain any attachments, but include a brief message identifying the type of notification and a hyperlink back to Trust Online to view the actual Notification Document on the Notification page. See **Figure 24**

Only the firm administrator and the person selected by the firm administrator can go to the Notification page on Trust Online and click on the **Document** number to view the actual PDF version of the payment reports, including claimant information, payment and check detail.

Firm Notifications					
Save To File < 1 to 1 of 1 >					
Document	Type	Attorney	Created Date	Comment	Trust
269285	Payment Notification		1/27/2007	Payment Notification	B&W

FIGURE 24

4.2 Attorney Notifications

4.2.1 Attorney Level

Deficiency and Offer Notifications are called Attorney Level Notifications and can only be viewed by the Attorney and the person designated by the Attorney to receive the email notification.

Both the Attorney and the designated person must have a Trust Online **Staff** or **Attorney** account and also an active email address included in their profiles. The Attorney must have an Attorney Account. See **Figure 25**

Attorney Account

Account Name	Smith, Robert
Account Type	Attorney
Attorney	Smith, Robert
Email	rsmith@acme.com
User ID	rsmith
Last Name	* <input type="text" value="Smith"/>
First Name	* <input type="text" value="Robert"/>
Email	* <input type="text" value="rsmith@acme.com"/>
Password	<input type="password"/>
Confirm Password	<input type="password"/>

FIGURE 25

4.2.2 Setting Attorney Notification Option

The Attorney can view the **Notification Option** specified for his/her claims on his/her **Profile** page. The options listed are **Paper** or **Electronic**. He/she can also elect to receive both types of notifications.

When selecting the Electronic check box, the attorney must select from the drop-down box the name of the designated staff account that he/she wishes to also receive the email notification. See **Figure 26**

FIGURE 26

The Deficiency Notifications are separated into Intake/Review and Release. The Attorney can designate different users to receive these email notifications.

4.2.3 Access To View Payment Notifications Online

When the Trust issues a deficiency and/or offer notification to the Attorneys that have elected to receive Electronic notification, an email is sent to the Attorney and the user who is designated by the ACH form to receive such notifications.

These emails do not contain any attachments, but include a brief message identifying the type of notification and a hyperlink back to Trust Online to view the actual Notification Document on the Notification page.

Only the attorney, the firm administrator, and the designated person can go to the Notification page on Trust Online and click on the **Document** number to view the actual PDF version of the reports, which include the claimant information and claim detail. See **Figure 27**

Attorney Notifications					
Notification Type		All	Search		
					Save To File < 1 to 4 of 4 >
Document	Type	Attorney	Created Date	Comment	Trust
266905	Offer Notification	SMITH, ROBERT	12/8/2006	Release Notification	B&W

FIGURE 27