Claims Under Edit Report

Understanding the Problem

The Claim Under Edit report allows the firms to view all of their claims that are currently being edited by users in their firm. Claims in edit mode stay "locked" in the same status for 30 days, as well as any linked claims, until the firm user either submits or cancels the edit. In other words, if a user editing a claim leaves that claim prior to submitting or cancelling their edits, this claim will be prevented from progressing on to the next stage of the claims process for at least 30 days.

For example, in the image above as the firm user begins editing a claim, a banner is displayed notifying the user that the 'Pending edits will be cancelled on 11/7/2020 if not submitted'.

As long as the claim is in edit mode, the claim will not progress onto the next step to have a Release Offer generated. This undoubtedly will increase the time it will take for a claim to progress through the necessary steps to receive payment.
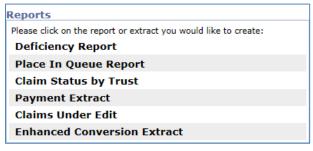
Objective

To identify claims currently "locked" in edit mode so that the user can either submit or cancel the edits. This process will prevent temporary inactivity and allow the claim to proceed through the normal claim process.

1. To run the **Claims under Edit** report, log into Trust Online and click on the **Reports** tab.
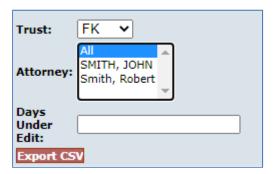

2. This will direct you to the **Reports** page which displays a list of pre-formatted reports in which everyone in your firm has access to. Click on the **Claims Under Edit** to begin the reports process.

3. After clicking on this report, a new page will be displayed with a number of criteria to select from. First select the **Trust** from the trust drop-down. You may only select one Trust at a time.

4. Next, specify the **Attorney**(s) from the list box or you may select **All** to run a report for all attorneys in the firm. You may select multiple attorneys by selecting the first one and then holding the <**Ctrl**> button while selecting other attorneys in the list.
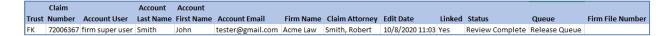

5. Next, enter the minimum number of days that the claim may have been in the edit mode. For example, to see all of the claims that are currently in the edit mode, leave the **Days Under Edit** field blank. This will return all claims that are being edited, even those that have entered the edit mode today. After entering all of the criteria, click the **Export CSV** button to export the data into a spreadsheet.

6. After clicking the Export CSV button, a file will open in a new window which will include the following fields: Trust, Claim Number, Account User, Account Last Name, Account First Name, Account Email, Firm Name, Claim Attorney, Edit Date (+Time), Linked, Status, Queue and Firm File Number.

Trust	Claim Number	Account User	Account Last Name	Account First Name	Account Email	Firm Name	Claim Attorney	Edit Date	Linked	Status	Queue	Firm File Number
FK	72006367	firm super user	Smith	John	tester@gmail.com	Acme Law	Smith, Robert	10/8/2020 11:03	Yes	Review Complete	Release Queue	

Current Users: With the information provided in this report, active current firm users can now search for the claims that have been "locked" to their name and proceed to the finish page of the claim(s) and either submit or cancel the edits.

Disabled Users: There may be some instances where the user(s) no longer work for the firm and have left claims "locked" in edit mode for less than 30 days. In most cases, these staff accounts have been disabled and access to the trust(s) and attorney(s) may have been removed. In order to remove claims from the edit mode, the firm super user will have to re-enable the user account(s), reset the user password and add the specific trust(s) and attorney(s) access or wait until the 30 days have elapse so that the system will automatically cancel the edits. Afterwards, any user with this username and new password can then login and proceed to the finish page of the claim and click the <**Cancel**> button.

> **Reminder Note**: After removing these claims from edit mode, the firm super user will need to remove the user's access to the attorney(s) and trust(s) and disable their accounts.