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Angeion Courtex – User Guide

ANGEION GROUP
Changing the Rules

www.angeiongroup.com | 215.563.4116

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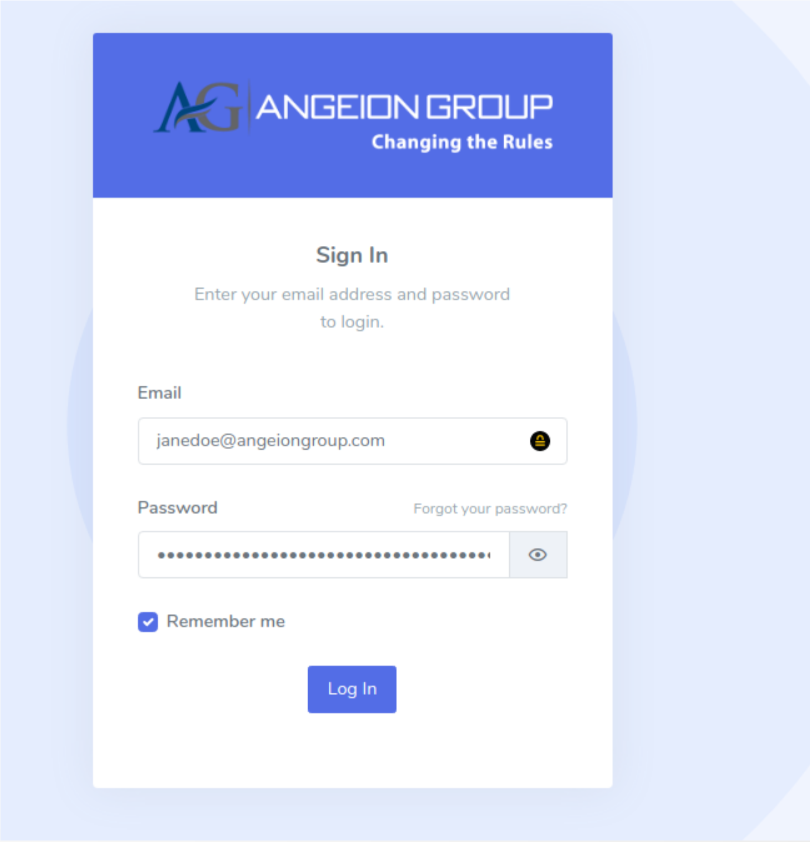
Getting Started

Access

Courtex can be accessed by going to https://courtex.angeiongroup.com

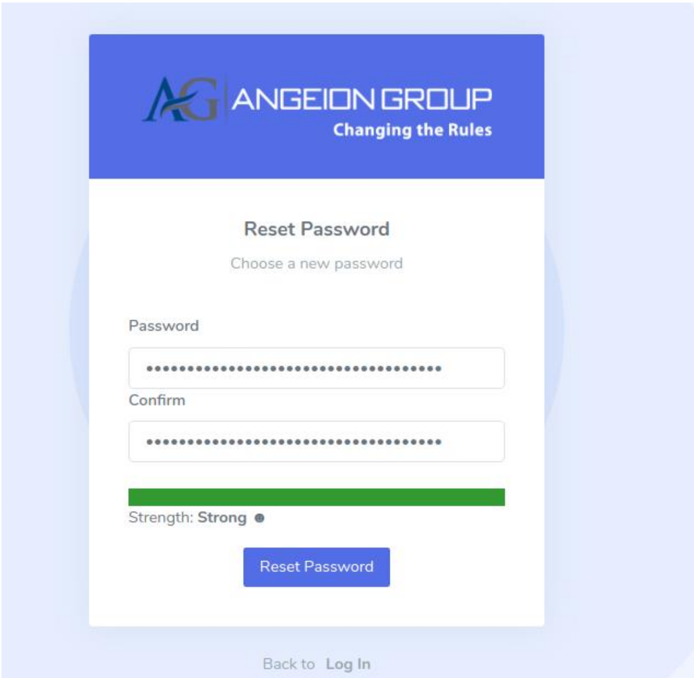
Logging In (First Time)

If this is your first time logging in, you should receive a welcome email with your credentials, which will require a password change.

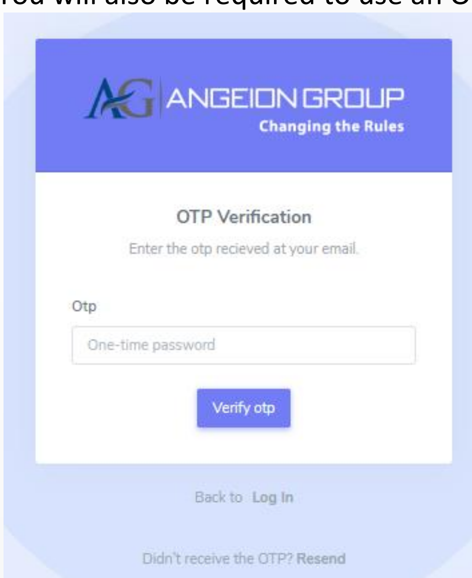


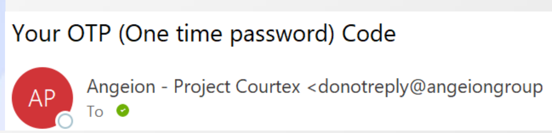
Password Change

Password must contain a letter, , special character, upper and lower case as well as be at least 12 characters long.

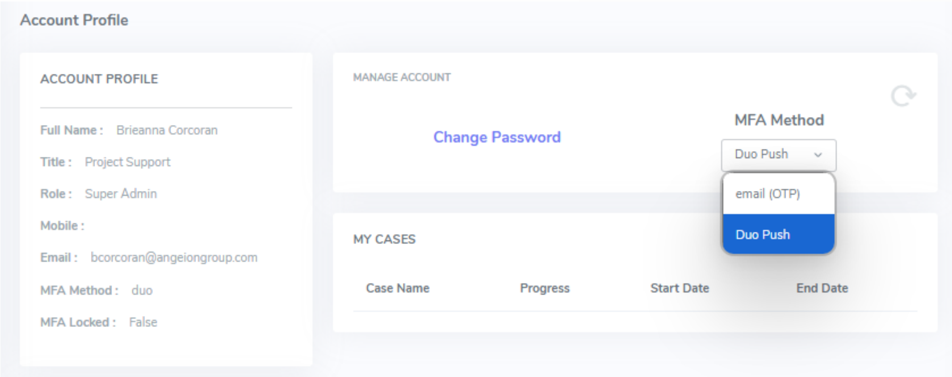


You will also be required to use an OTP (One Time Password)



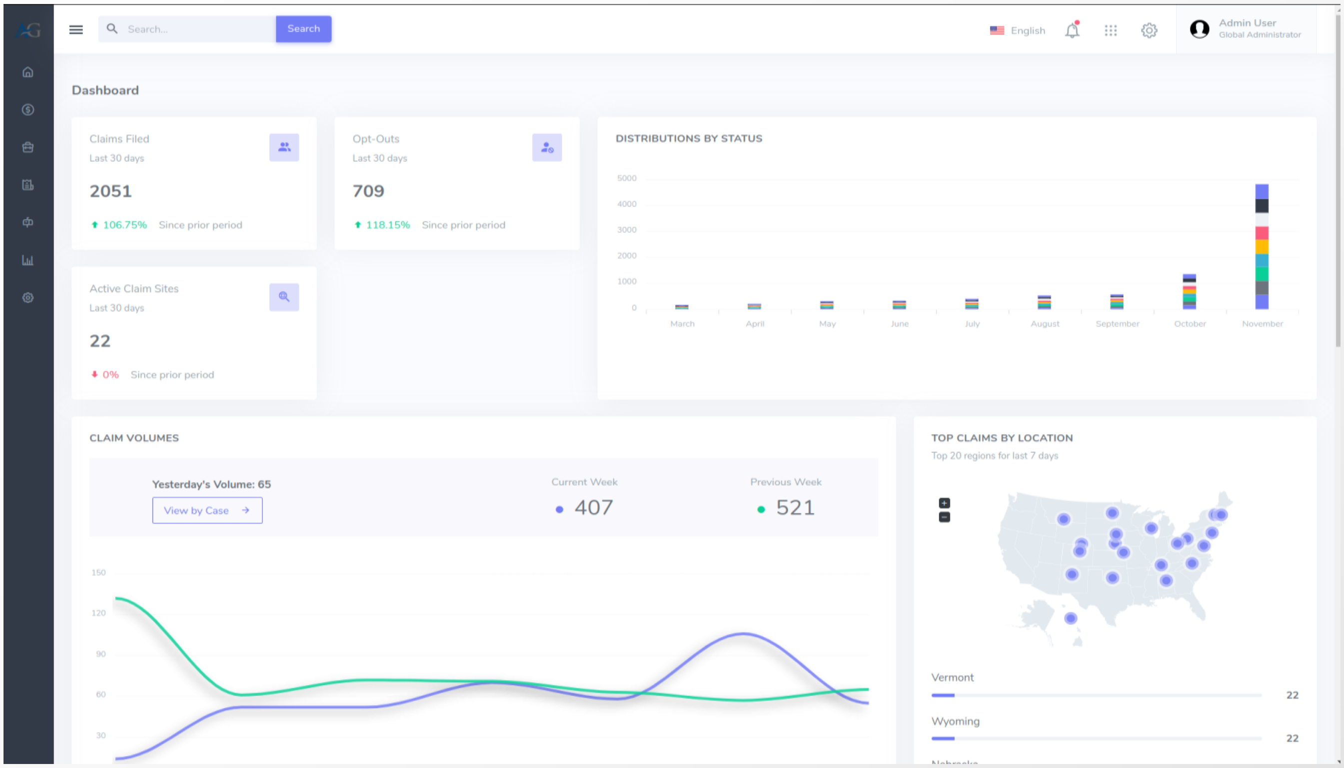


Once you have input your OTP it will open to the Dashboard. You may switch from using an OTP upon sign in to a Duo Push by going to your account and changing the MFA Method.



Dashboard

Once logged in it will open to the Main Dashboard. This is different from the Case Dashboard.



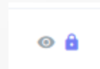
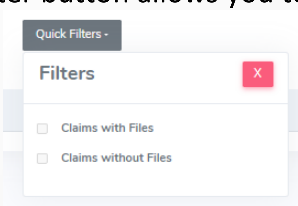
Browsing Cases & Claims

Case Views

Since data is stored in multiple locations, there are several views of class and claim related data, including:

- Cases->Class Members
  - This will let you browse all class members loaded online and if they submitted a claim online. Paper stored in LAW will be viewable soon.
  - This view is limited to cases you're assigned to or based on your role (if your role allows viewing all cases)
  - To add your group you must go to Cases-->Cases-->*CaseName*-->Review-->Groups with Access-->Add Group-->*Pick Group*-->Submit
- Cases->LAW Data
  - Displays all LAW related information for Master and Claim cases. You will need to select the appropriate database first and then you can search and update as needed.
  - To search and update claims, select either Master or Claim cases.
  - Claim Details: Detailed claim information such as Files, Claim Information, Claim Responses and Contact History can be viewed by clicking on the View icon ( ) on the right side of the line-item. Files can also be added in the Claim Details.
    - Add File
      - Under Files, right click on the folder you want to add a file to.
      - When the upload box pops up, drag and drop file(s) into the upload box, or click on the upload box and navigate to the file(s)
      - Click Upload
  - Edit Claim: Claim details can be edited by clicking the Edit icon ( ). All fields will also update data in LAW.
- Cases->Online Claims
  - Displays all online claims filed in a unified view, allowing you to search for a claimant across cases.
  - Similar to LAW Data, you can view and edit details of a claim by clicking the respective icons on the line-item for the claim.
    - View Details: Allows you to view files associated with the claim, claim information, claim responses, and contact history
      - Files: Lists all files associated with a claim. Allows you to upload new files like you would when adding new files in the LAW Data module.
      - Claim Information: Contains status of the claim, claimant/claim information, notes, and payments.
      - Claim Responses: Lists both the Claim Responses and Claim Transactions from the claimant.
      - Contact History: Lists all contact regarding the claim. Contact events can also be added manually.
        - Add Event: Click the icon and click Add Event.
        - By default, the method will be Email and purpose is Correspondence. For logging a contact event, Correspondence should be left as such. Description/Details will be what the

correspondence was about. Address is where it was sent to at that point in time. This can be a physical address, email address, or phone number. Update Status and Channel to appropriate option and click Submit.

- Cases->Claim Review
  - This is organized by case but displays the same information as Online Claims except that it is set up for claim review with some additional information
  - This view will also list the Campaigns associated with the claimant's case. Campaigns and Sub Campaigns can be added by clicking the icon under Notice Campaigns
  - Claim Review will also display any groups with access to the case under Groups with Access.
  - This view is limited to cases you're assigned to or based on your role (if your role allows viewing all cases)
  - To add your group you must go to Cases-->Cases-->*CaseName*-->Review-->Groups with Access-->Add Group-->*Pick Group*-->Submit
  - An added functionality to Claim Review page is that it locks next claim using Get Next Claim Button – you will see a lock appear once out of the claim 
  - The Quick Filter button allows you to search for claims with or without documents for 

easy viewing

Claim Review - Message Codes

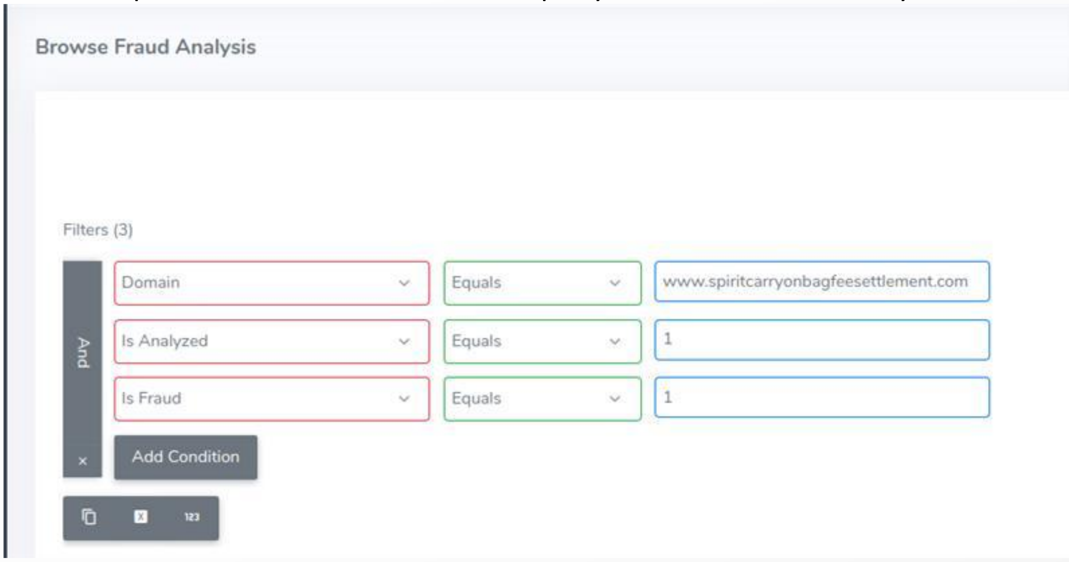
  - Cases -> Claim Review -> Filter By Message Code
  - Allows you to search for claims that have specific message codes assigned to them
  - Cases -> Claim Review -> View Claim (claim review) -> Apply Message Codes (last accordion on left side of page)
  - Apply and/or Resolve a message code to a claim

Cases->Create Claim

  - This provides the ability to Create Claim to Push Records to SmartOps (only used for cases that are also using SmartOps for document coding/indexing)
  - Ability to upload directly to the SmartOps S3 bucket from the Create Claim view

- Cases-> Fraudulent Analysis
  - AngeionAffiirm runs on all claims but only updates status to fraud on generic claims. Filer for `is_fraud` = 1 (or true) and `is_analyzed` = 1 for your results.
  - The claim table is updated for Fraud status 24 hours after a claim has been submitted.

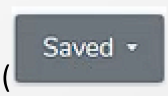
- The lapse in time is necessary to make sure all fraudulent activity is considered. For the most up to date numbers it is best to query the fraud table directly.



Managing & Customizing Views

Courtex allows for custom view configurations when browsing cases. To change which fields appear when you browse the case:

- Click Manage View
- Delete any views you would like to hide by clicking the x next to the field and add fields by typing in the box with the fields and selecting the field in the list that populates.
- Once the view is ready, click Save
- Type the name of the View in the prompt and click OK

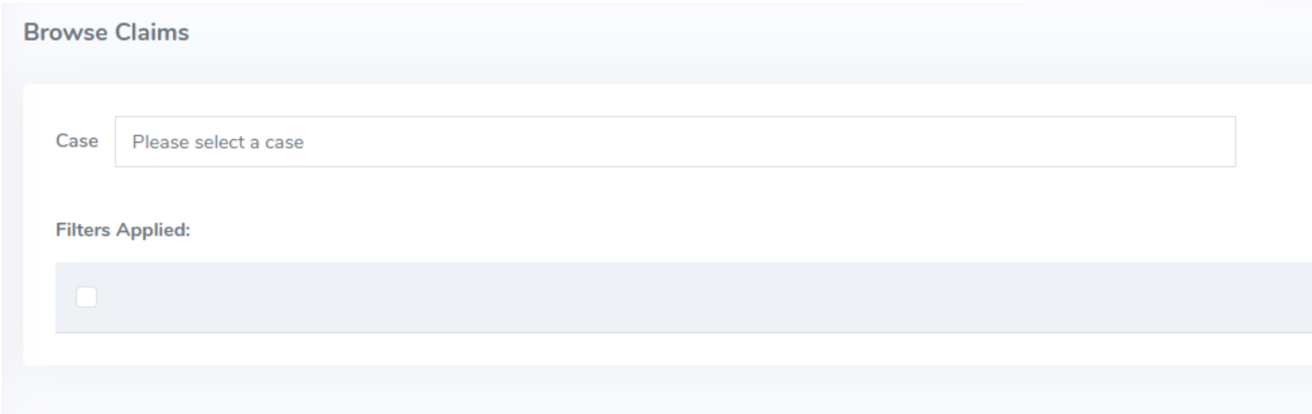
To select a different view. Click on the Saved button (

). This will give you a dropdown list of all your saved views. Select the desired view from the list. If you would like to go back to the Default View, then click the Default View button on the top right.

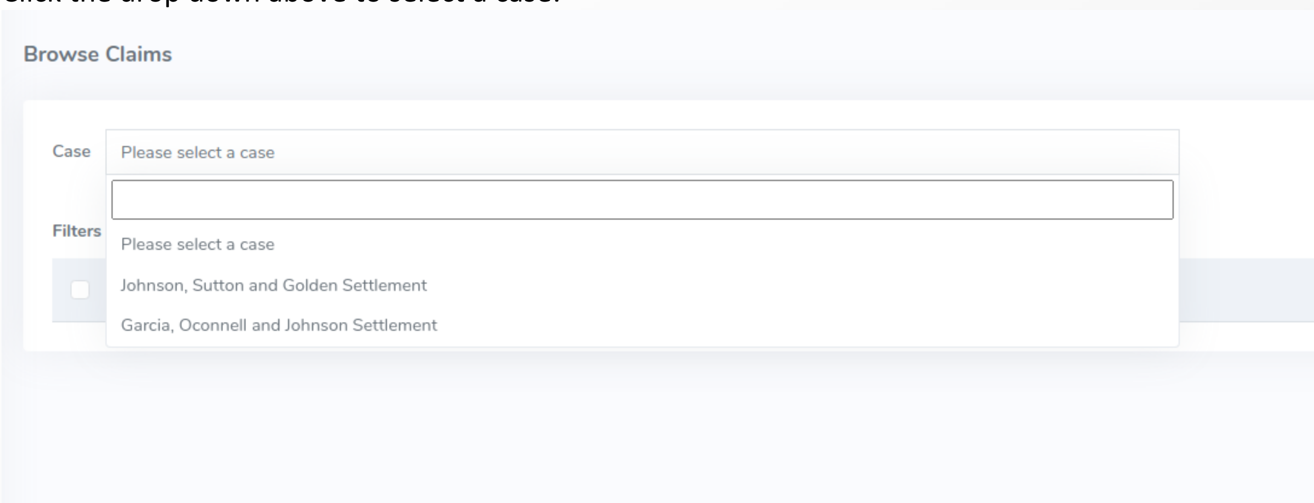
Navigation

Applicable to: Claim Review, LAW Data, Class Members

Selecting a Case to View



Click the drop down above to select a case:



You can type to search for a case. You can only view cases that your group has been added to. If you do not see any cases, please contact Angeion Support.

Advanced Search

Courtex gives users the ability to create custom queries through the advanced search feature. Conditions can be added to refine data to equal certain values. ‘Or’ and ‘And’ conditions can be applied to limit results to data where one or both conditions apply.

- Conditions: Conditions can be added to refine search results. Conditions require two to four parameters.
  - The first is the field you would like to apply the condition to.
  - The second field gives you options of how you want the values to affect the query results. The dropdown options will be affected by the type of data in the selected field. E.g. Fields with dates can equal a date, be between two dates, or be before/after a specified date.
    - Not Empty and Empty do not have additional inputs

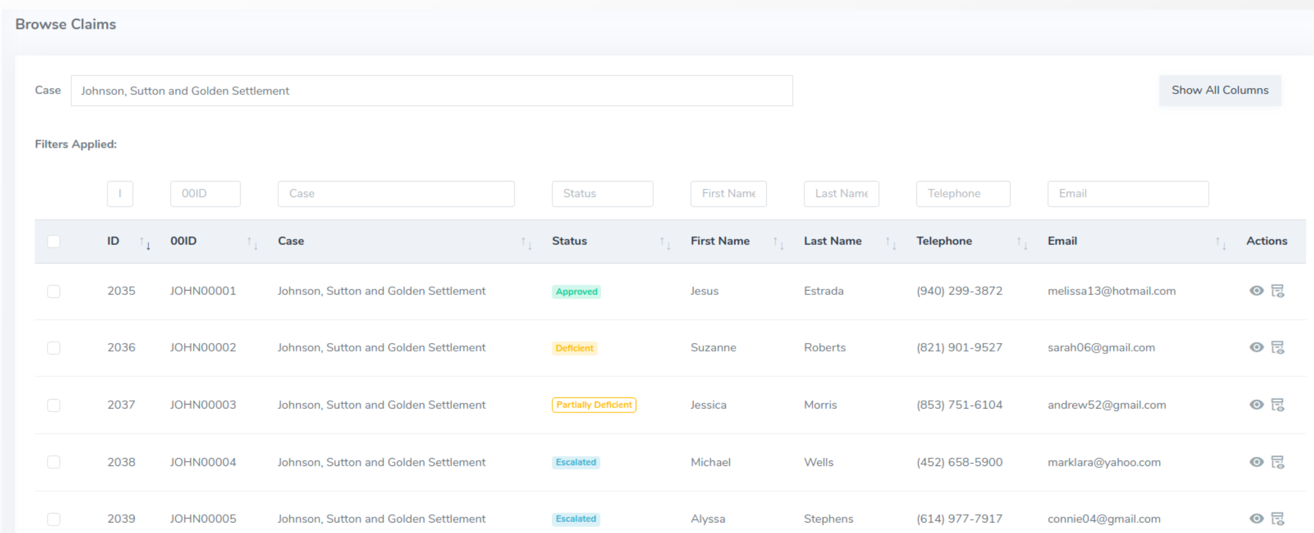
- The third field(s) of the condition is the value that you want the condition to be applied to. E.g. If searching for all Street Addresses that begin with 2, You would put 2 as the value and the full condition would be Street 1, Starts With, 2 like in the below image. 

- Or: The 'Or' condition will search for data where either one condition or the other is matched. E.g. If you are trying to identify all cases in two different states, you can search for all cases that are in California OR New York.
- And: The 'And' condition will search for data where both conditions are matched. E.g. If one condition is State, with a value of California, and the other condition is Claimant First Name with a value of John, then the query will pull all claimants with a first name of John in the state of California.

Browse Results

Applicable to: All views

After selecting a case, you will see a list of claims like the below:


Browse Claims

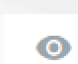
Case: Johnson, Sutton and Golden Settlement — Show All Columns

Filters Applied:

ID	OOID	Case	Status	First Name	Last Name	Telephone	Email	Actions
2035	JOHN00001	Johnson, Sutton and Golden Settlement	Approved	Jesus	Estrada	(940) 299-3872	melissa13@hotmail.com	
2036	JOHN00002	Johnson, Sutton and Golden Settlement	Deficient	Suzanne	Roberts	(821) 901-9527	sarah06@gmail.com	
2037	JOHN00003	Johnson, Sutton and Golden Settlement	Partially Deficient	Jessica	Morris	(853) 751-6104	andrew52@gmail.com	
2038	JOHN00004	Johnson, Sutton and Golden Settlement	Escalated	Michael	Wells	(452) 658-5900	marklara@yahoo.com	
2039	JOHN00005	Johnson, Sutton and Golden Settlement	Escalated	Alyssa	Stephens	(614) 977-7917	connie04@gmail.com	

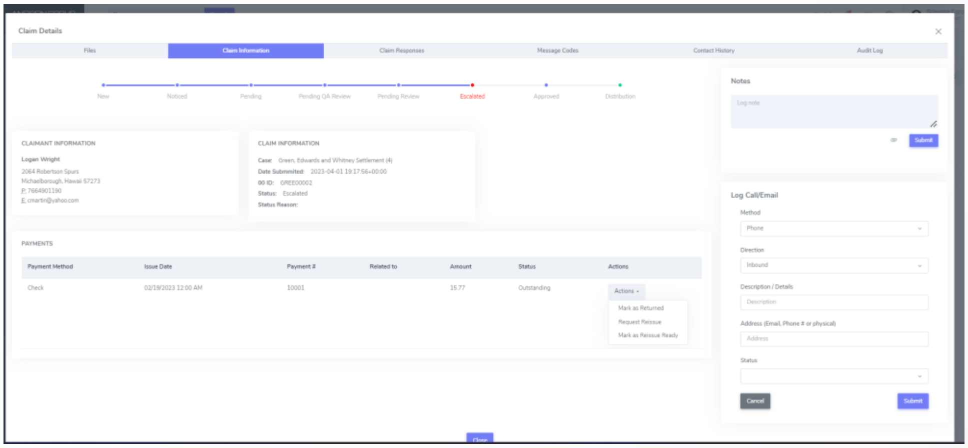
Each column can be queried (see Searching).

On each row you will find a predefined view for the screen that you are on. On the right side are action items, including the following:

View Details Modal 

Available for: Online Claims, Claim Review, Class Members, Payments

Where available, clicking on the view details icon will bring up a modal.



In the above, you will see:

- Current progress of the claim
- Basic claimant information
- Claim details
- Any payments that have been distributed to the claimant
- **Claim Data**
    - This will render responses submitted by the individual
- **Transactions**
    - For cases where individuals submit individual transactions as part of their response, this will display the fields submitted
- Notes by Angeion and/or your team will be displayed on the right.

Viewing All Fields & Editing ( )

Available for: most views

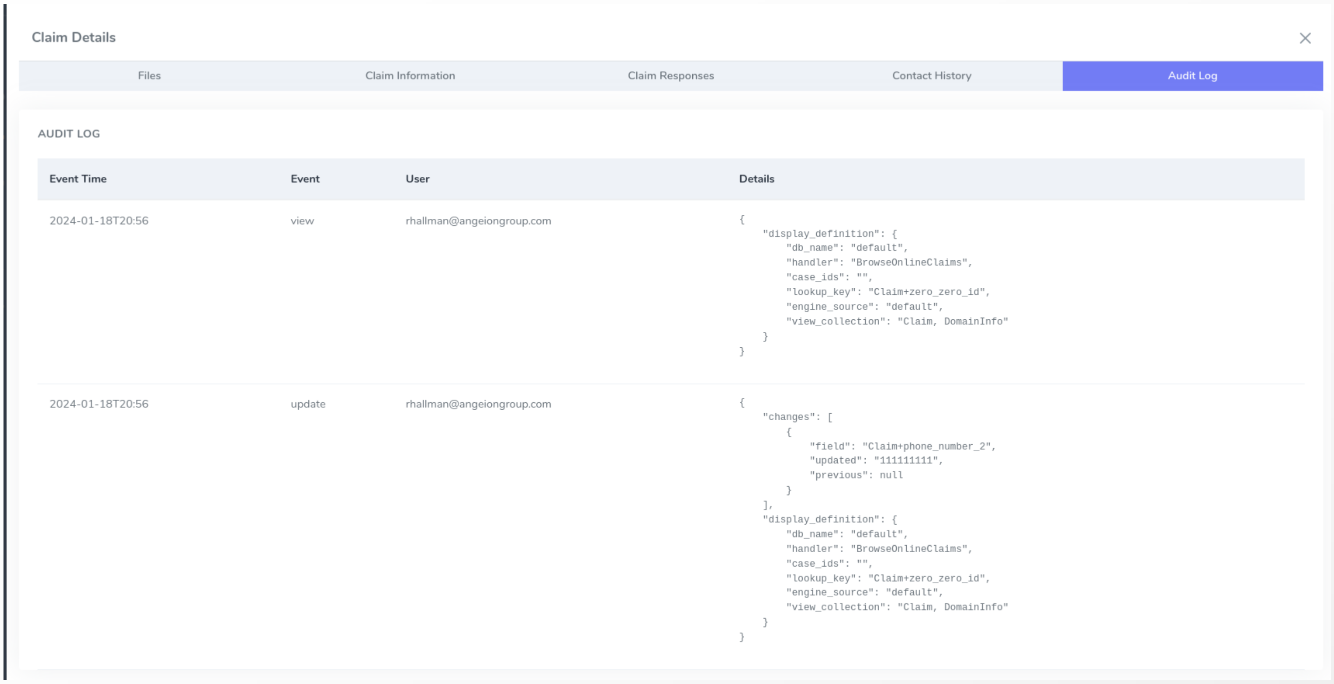
When an edit icon is available, you are able to view all fields for the view and edit fields by making changes directly in the field and then tabbing off. A green notification will display the change in the upper right once clicking off.

Undoing a Change

Should you need to undo a change, you can undo the last change by pressing CTRL + Z, which will undo the last change and once you tab off the field, it will save the change.

Audit History

Every change made will be saved to the database in an audit log with who made the change, when and what was changed, including the original value. Viewing this is only possible for those in Data, IT and Leadership roles.



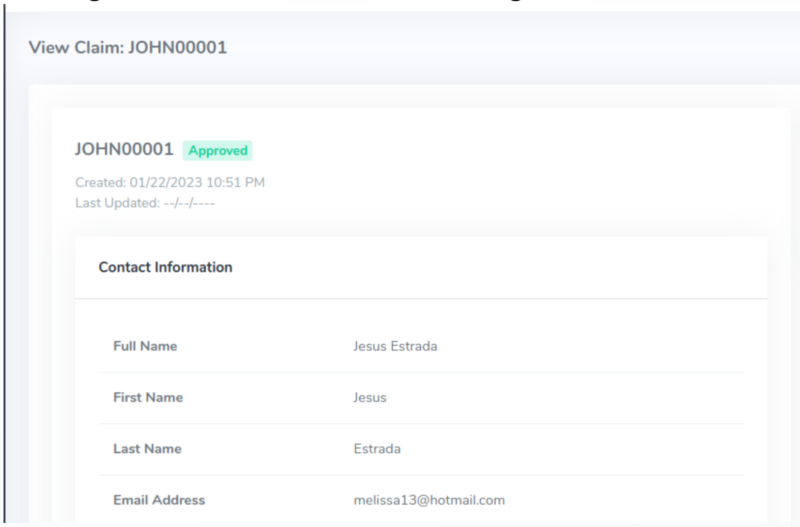
Read Only Fields

Fields that are slightly greyed out are read only.

Review Item

Available for: Online Claims, Claim Review, Class Member

Clicking the  icon will result in being redirected to the View Claim page:



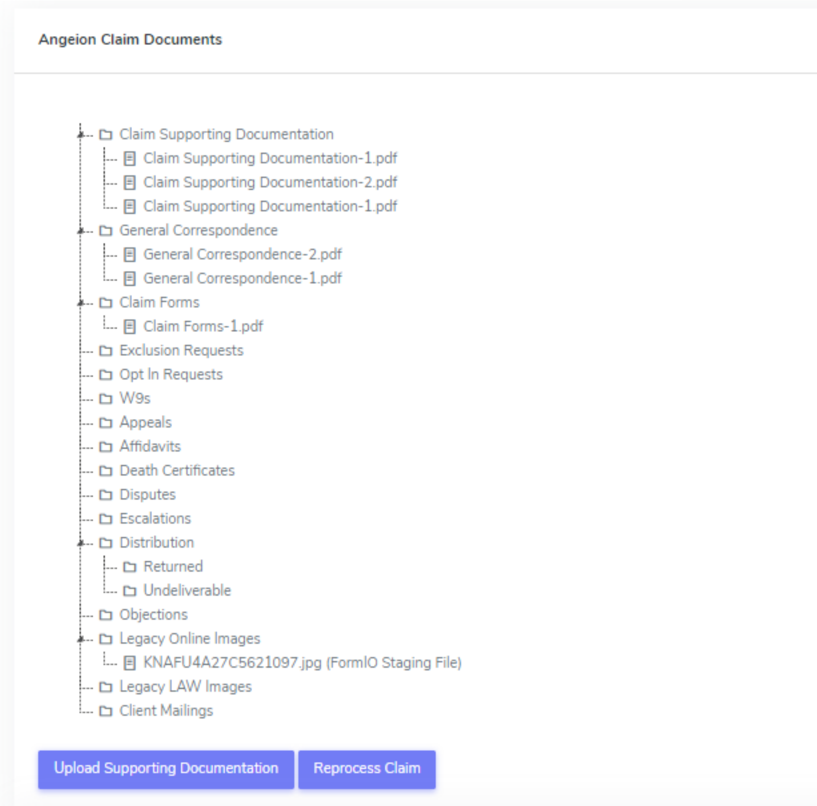
Information about the claimant is displayed on the left side while any submitted documents are displayed on the right.

The claim view page will fetch and show related Form.io form and submission if it exists.

Legacy Docs from Online Claims are under **Legacy Online Images** – Legacy Docs from mailed in or Uploaded claims are under **Legacy Law Images**

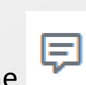
Legacy Online Images - Images that are uploaded through the online claims websites by the claimants. New settlement sites that have documents indexed/coded through SmartOps will show directly under the correct file category, which is why these are being labeled as legacy.

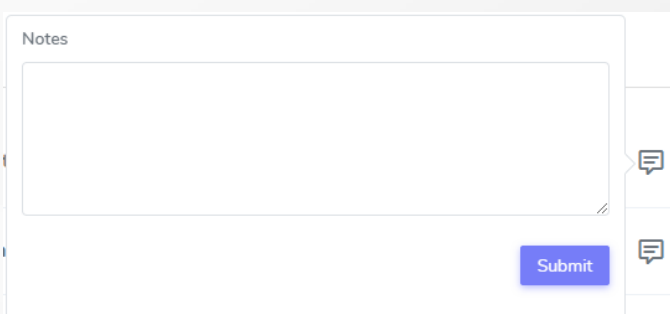
Legacy Law Images - This will display a single file per LAW case database that can be clicked on to view the images from LAW. This will only display images IF the 00ID is the same and the database has been mapped.



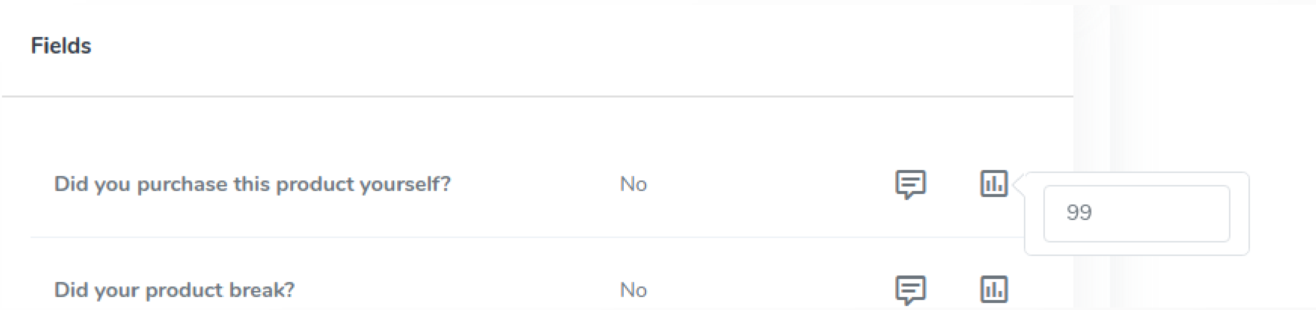
You can click each icon to display the images. If more than 4 are available, you can click the pagination numbers at the top right to display more.

Commenting Responses

You can create comments on each line item response by the claimant by clicking on the  on each row which will open a comment dialog:

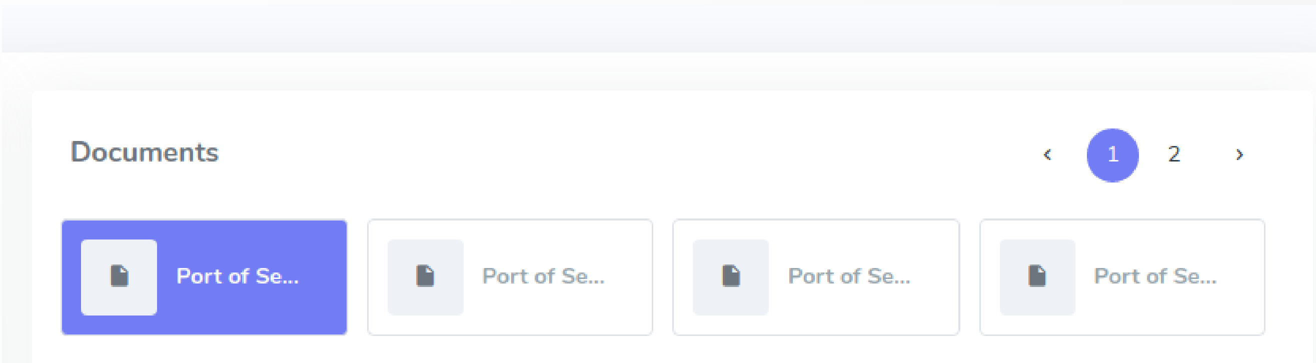


Additionally, if enabled in the case, you can assign a rating to the submitted response:

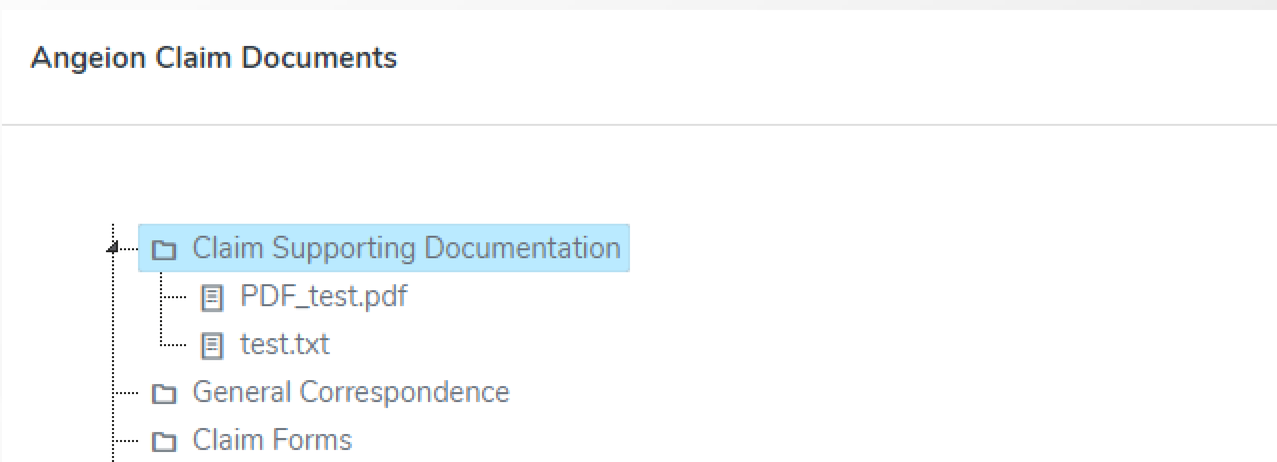


Claimant Files & Internally Uploaded Files

Files uploaded by the claimant are stored separately and displayed in the bar at the top right of the review screen:



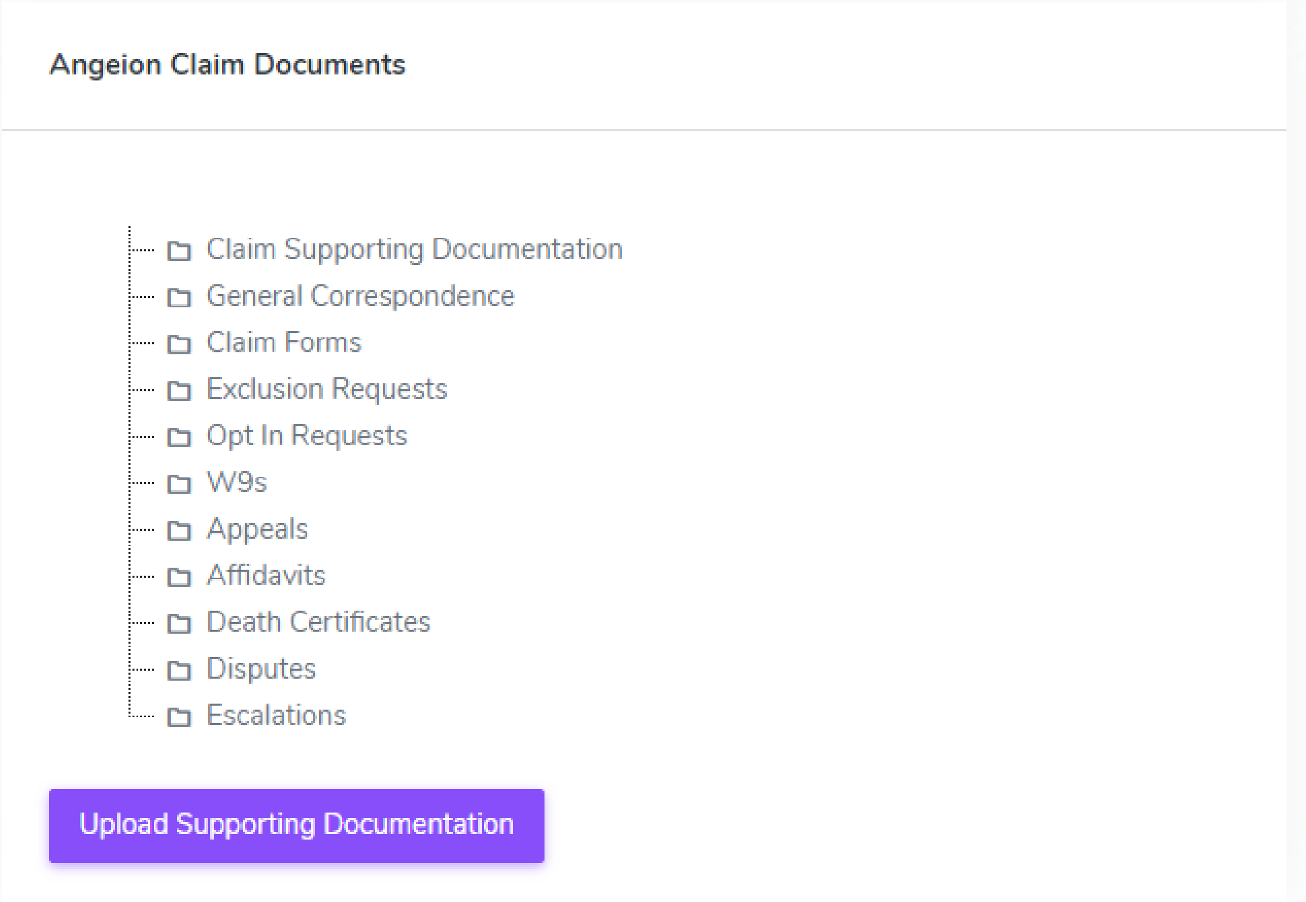
Files uploaded by Angeion are found in the File Category tree:



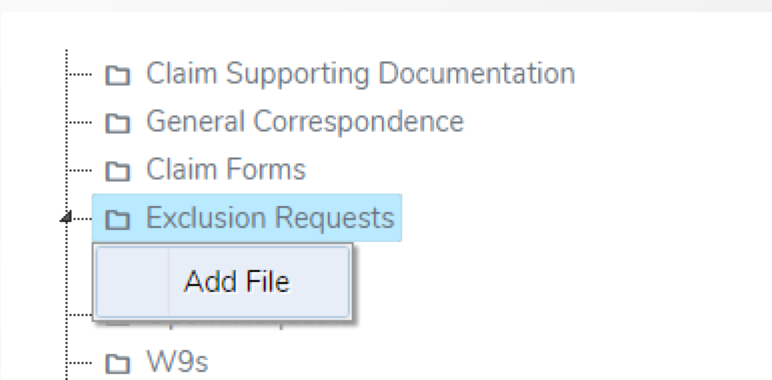
Note: you need to click on the category to see the files uploaded.

Uploading Documents

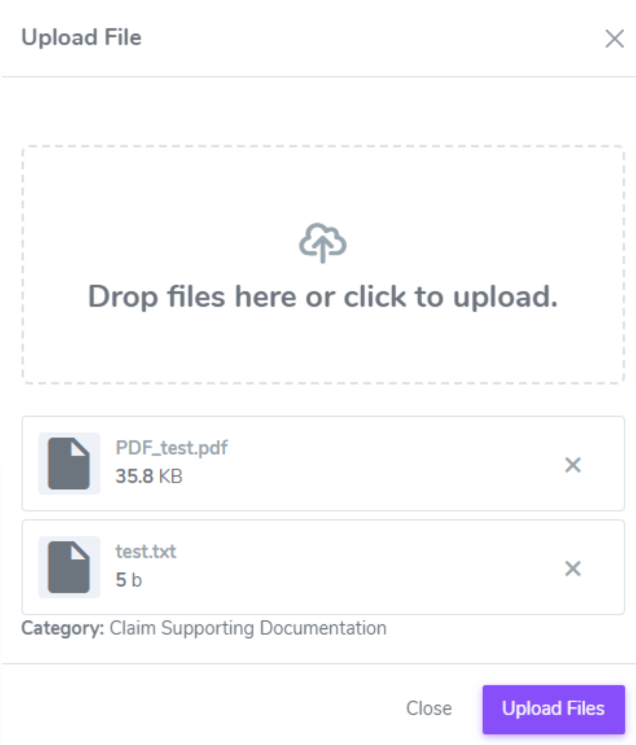
You are able to upload documents at the bottom right of the Claim Review window. The “Upload Supporting Documents” button is tied to the “Claim Supporting Documentation” category.



If you have a different type of document, you can right click on the appropriate category and click “Add File”:

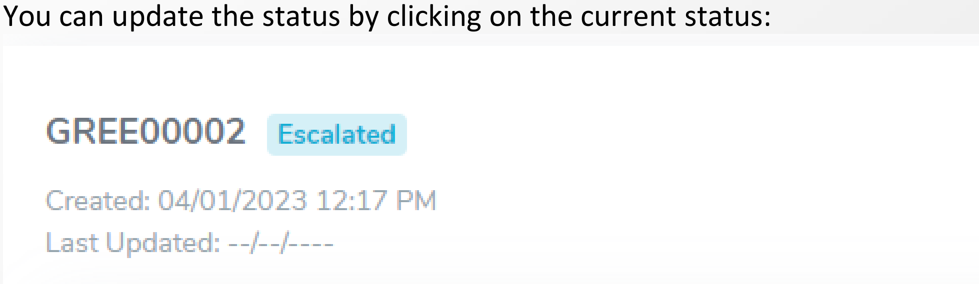


To add a file, just click (or drag and drop) files into the box and when selected, you’ll see a preview of files to be uploaded:

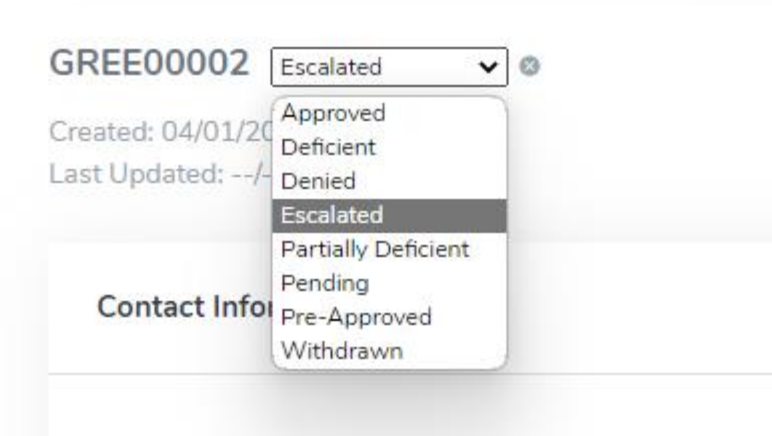


Changing Claim Status

You can update the status by clicking on the current status:



And then selecting from the drop down:



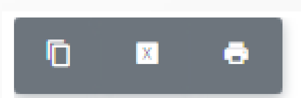
Viewing Images (LAW)

When opening the edit modal, there is a button on the bottom right to view images which will compile the tiff images into a combined PDF image. Some color scans are not convertible to PDF and may display a message indicating the server was unable to prepare the images.

Tif images that are not converting to PDF for download may be downloaded as a Zip

Copying, Exporting & Printing

Applicable to most views



(Copy, Export to CSV, Print) - Functionality to download tif images from LAW as a zip if they are not converting to PDF

Based on your query for the display, the above will get ALL results applicable to the query.

IMPORTANT NOTE: The server has a 60 second time out set so very large queries (over 1M rows) will most likely time out and will require data team to query on your behalf. Support for large queries will be added later.

Searching

General Search Functionality

- To search columns not displayed, click the "Show All Columns" button to display all available columns
- The current search parameters (filters) will be displayed as cards that can be removed by clicking the X button.
- Wild card search:
    - '%' before a word will match anything before (e.g. '%torres' will match 'De La Torres' but not 'Mitch-Torres King')
    - '%' after a word will match everything after
    - '%' can be placed anywhere for partial matches between letters (e.g. 'de%torres' will match 'De La Torres' and '%torres%' will match 'Mitch-Torres King')
    - '!' can be used for not this word
    - 'none' can be used to search for empty fields (pair with '!' to find not empty fields)
    - '|' can be used as an 'or' operator (e.g. searching 'CA|FL'
- All tables are sortable by clicking the header column

Row Highlighting

Courtex will highlight the currently selected row. Search results can be navigated through using arrow keys.

Creating Claims & Uploading Email Attachments

Courtex allows you to create claims as well as updating existing claims with email attachments. Both functions are performed within the same page in Courtex.

Create a Claim with attachments:

1. In the main navigation, selected Cases > Create Claim.
2. Select the case for the claim using the Case dropdown.
3. Leave the Claim field blank. After submitting a new claim id will be generated for you.
4. Click on or Drag and Drop files into the upload box. Your files will be staged for upload to Courtex.
5. Click "*Upload Files to Claim*".

Add attachments to existing Claim:

1. Make sure to note the Claim ID of the claim to which you'd like to attach files.
2. In the main navigation, selected Cases > Create Claim.
3. Select the case for the claim using the Case dropdown.
4. Enter the Claim ID you noted to the Claim field.
5. Click on or Drag and Drop files into the upload box. Your files will be staged for upload to Courtex.
6. Click "*Upload Files to Claim*".

Once upload is complete your files will show under the Claim file browser. See Claimant Files for more information.

Cases

The case module displays all cases and basic information of the case when you click Review.

Payments

Payment functionality is in three main views which are described in the following sections

Modules

Browse all payments

- This will let you browse all payments issued for all methods regardless of the claimant having made an online or paper claim. If the payment is uploaded, you will be able to query it by at least payment identifier (e.g. check #)
- Clicking on any payment line-item provides more detailed information, such as the status of the payment, bank details, account number, distribution round, etc and will have basic information on the claim.
    - In the detailed view, payments can be manually overridden by clicking on Actions and selecting Mark as Cleared, Mark as Outstanding, Mark as Returned, Request Reissue, Mark as Reissue Ready, Mark as Void & Reissue or Void depending on the actual state of the payment.
- The Import CSV and Update Payments buttons can be used to import new payments or update payment status (cleared/void):
    - Import CSV (used for new payment imports like new checks):
        - Click Import CSV
        - Provide the Distribution Round, Payment Vendor, Payment Method, Account and Date Issued. Payment Vendor and Account will generate a list of options once you begin typing. Once all fields are filled out, click Next to go to the Import Wizard.
        - The Import Wizard requires the 00ID, Payment Amount, and Payment Identifier as a minimum. Other columns can be imported optionally. An example .csv file can be downloaded for reference. If your .csv file has the minimum required information, click Next Step
        - Upload your CSV or Excel file by either dragging and dropping the file into the upload box or clicking the upload box and navigating to the file. Once the file is selected, click Next.

        - The import wizard will attempt to map the required fields to the imported file's column headers. Ensure that the columns are correctly mapped to the matched fields and, if so, click Next Step and import the data.
    - Update Payment (used for payment status updates, like reconciliations other than Huntington Bank)
        - Click Update Payments
        - Be sure the Payment Method and Account number (void date as well if bulk uploading for void) are located in the file being uploaded. Courtex will autofill this info once document is uploaded. This allows for multiple accounts and multiple payment methods being uploaded at once.
        - The Import Wizard requires the 00ID, Payment ID, and Updated Payment Status.
        - Upload your CSV or Excel file by either dragging and dropping the file into the upload box or clicking the upload box and navigating to the file. Once the file is selected, click Next.
        - The import wizard will attempt to map the required fields to the imported file's column headers. Ensure that the columns are correctly mapped to the matched fields and, if so, click Next Step and import the data.
    - Imports are given an import ID, so it is possible to reverse an import if a mistake is made.

Manage payment methods

- Payment methods such as check, ACH and more are controlled here
- Additional payment methods can be added by the Data Team.

Payment Accounts

- Accounts where funds are held are managed here
- Add Account button can be used to add a Payment Account.
    - Fill in the Institution Name, the new Payment Account Name, and Account Number and click Submit.
    - If the organization is not available in the selection, those can also be added in Administration->Organizations

Reconciliation

Accounts at Huntington Bank are reconciled every evening, which a two day lag to allow for positive pay exceptions to be cleared.

Check Reissues & Status

Overview

Check reissues can be handled in Courtex from the following areas:

- Browse Online Claims
- Within LAW Cases
- Browse All Payments

Initiating a reissue can be done quickly by anyone on the team from the Details modal for the 00ID or the actual payment record. The following statuses are supported:

- Outstanding: check has not been cashed or cleared yet
- Cleared: payment has been marked as cleared
- Void: payment has been marked as void
- Void & Reissued: payment was voided and reissued as a new payment
- Reissue Requested: a reissue request is submitted but not ready
- Reissue Ready: a reissue is ready to be cut by accounting team and the appropriate supporting documents have been uploaded
- Returned: payment was returned to Angeion by the CM
- Undeliverable: payment was not able to be delivered

Workflow

Operations Workflow – Project Support

Upon receiving a request from a claimant for a check or payment reissue, you can do the following to initiate a reissue

1. Find the payment for the 00ID using the LAW search, online claim search or directly in the payments module.
2. Click on the details icon (eye icon)
3. Find the actions button for the appropriate payment in the table:

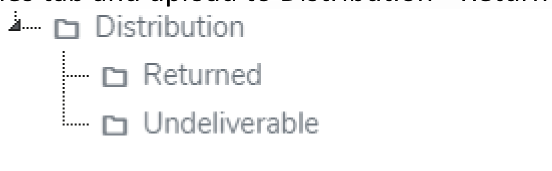
PAYMENTS

Payment Method	Issue Date	Payment #	Related to	Amount	Status	Actions
check	2023-03-30	1234		23.45	Reissue Ready	Actions
check	2023-04-01	1300	1	23.45	Reissue Reque	
check	2023-04-02	1301	2	23.45	Reissue Ready	Actions

   a. For reissue request but supporting documentation is not ready:
      i. Click Mark as Reissue Requested
      ii. In the details prompt, input the reason there is a reissue request and what else is needed (this will be recorded as a new comment)
      iii. A date stamp will be applied in the "Date Reissue Requested" field
   b. For reissue requests with all of the necessary information, mark as "Reissue Ready"
      i. Input the details of the reissue which will be recorded as a comment

    ii. Upload supporting documentation in the appropriate category under the Files tab

c. For a return check, mark as a return and upload a scanned copy of the image to the Files tab and upload to Distribution->Returned



Operations Workflow – Project Management

Until reissue rules are implemented that allow for the process to be automated, the project management team should continue issuing a task in LiquidPlanner for each case they would like reissues to be done for.

Monitoring Checks in Reissue Requested Status

Checks in reissue requested status may need additional follow up per operational requirements. If they do, they can be filtered for in the Browse All Payments module by filtering for payments in the status of “Reissue Requested” and the case. They can be exported to Excel if needed.

Requesting a Batch of Reissues

Once a case is ready for a batch of reissues to be handled, following the standard process of creating a ticket in LP and then emailing accountingsupport@angeiongroup.com the case that you need a reissue to happen.

Accounting Workflow

Once a ticket is received for reissues, you can go into Browse All Payments module, filter by the status of Reissue Ready and export to Excel. You can optionally filter by case if you want to handle one case at a time. In the Excel file, you will have the necessary information to create new checks for the case.

Once they have been reissued, you can upload the Excel file with an updated status of “Void & Reissued” to close out those payments.

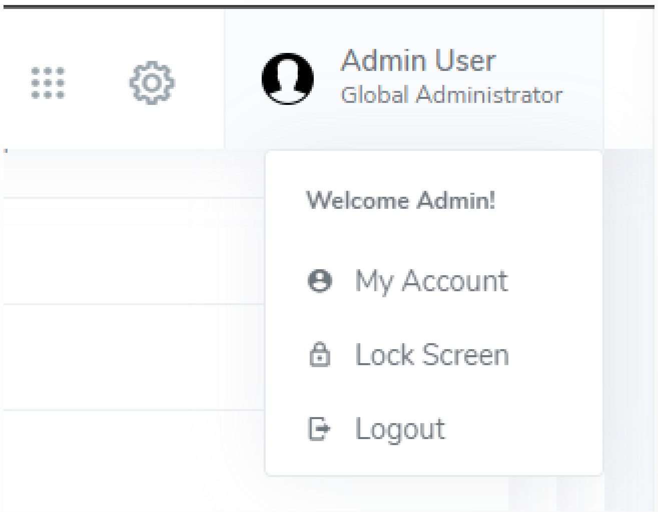
Other notes:

- While payments are in the status of “Reissue Requested” or “Reissue Ready”, they will still be reconciled and marked as “Cleared” if the payment clears. When that happens, they will no longer appear under the reissue status (they’ll be cleared) but you can identify those by the ones that have a Date Reissue Requested or Date Reissue Ready set.
- When uploading the reissue file to Courtex, it would be ideal to include the Parent Payment Identifier which will link the payments together.

General

Lock Screen & Logging Out

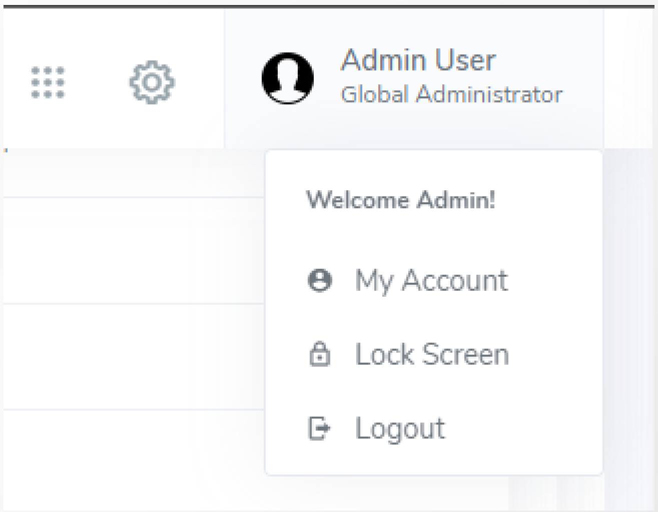
To ensure privacy, when you leave your computer, you can lock the screen by clicking on your username at the top right and clicking “Lock Screen”



Similarly, you can click the Logout button to end your session.

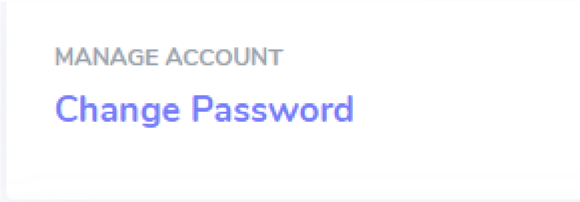
Changing Password

To change your password, click on your user icon on the top right:



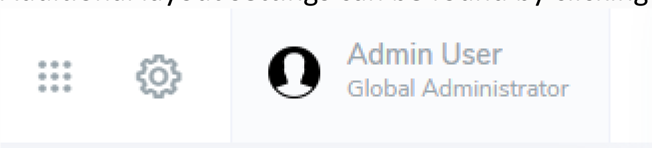
And click “My Account”

Under “Manage Account” you can click “Change Password”



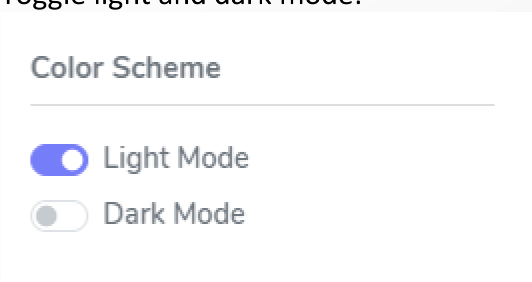
Changing Layout

Additional layout settings can be found by clicking on the gear icon at the top right:



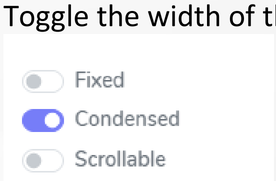
Dark/Light Mode

Toggle light and dark mode:



Sidebar Condensed or Full

Toggle the width of the sidebar using the below:



Notice

Browse Notice Campaigns

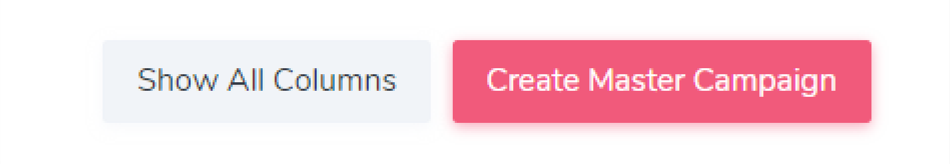
This organizes the Notice Campaigns for outreach to potential claimants. A Campaign is the master campaign, which contains all the information that makes up everything for a certain case, including the initial notice and any additional notices. Sub Campaigns are notices associated with the master campaign. Any additional notice for a campaign will be a Sub Campaign. Examples of a Sub Campaign may be email notices or Facebook advertisements sent for a certain case.

When viewing the Campaign module, you will see a list of master campaigns for all cases.

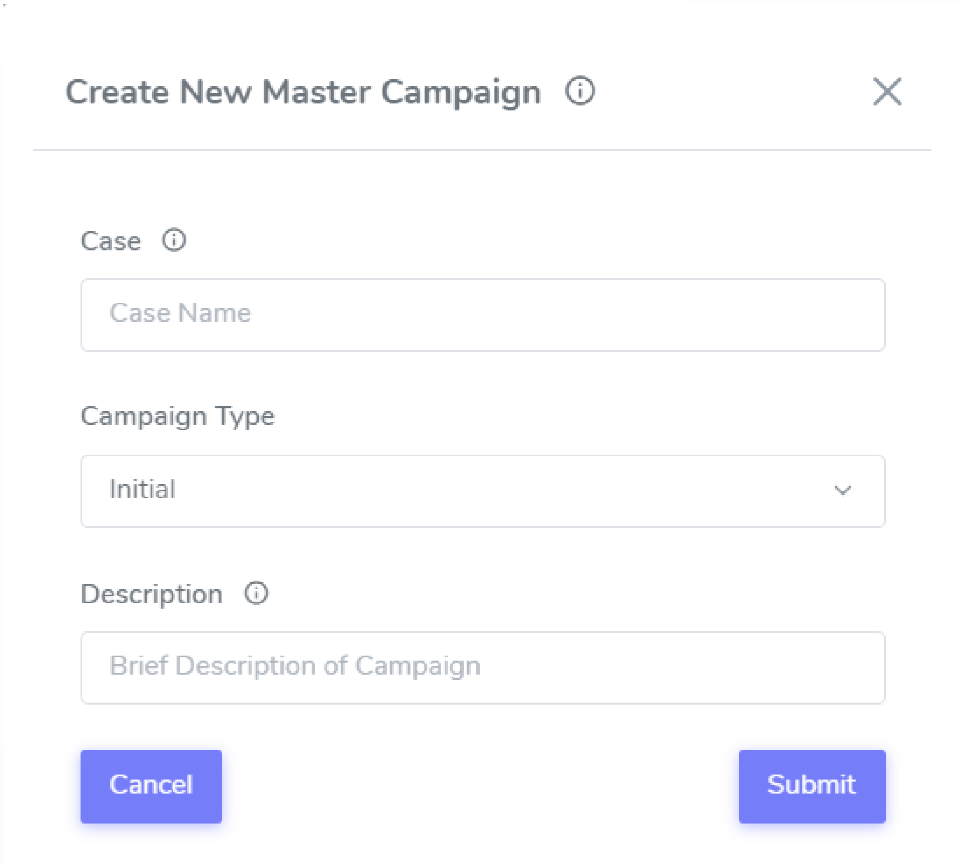
Creating a Master Campaign

A master campaign serves as a logical grouping of several related activities. For example, initial noticing would be a master campaign while the sub-campaigns (components) could include email notice, postcards, social media, etc...

To create a new campaign, click on the Create Master Campaign button:



Fill in the fields in the form (there are help blurbs describing each):



Create New Master Campaign

Case

Case Name

Campaign Type

Initial

Description

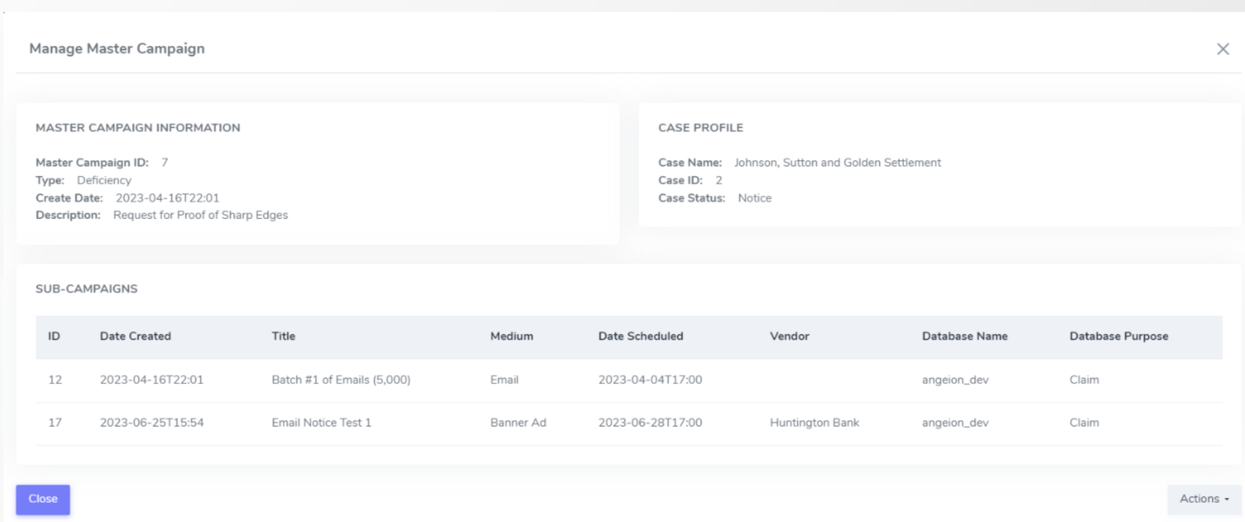
Brief Description of Campaign

Cancel

Submit

Adding Sub-Campaigns

Once you have a master campaign, you can add sub-campaigns for each component. To get to the sub-campaign creation, find your newly created campaign (or an existing one), and click the View Details button (eye icon) to get an overview.



Manage Master Campaign

MASTER CAMPAIGN INFORMATION

Master Campaign ID: 7
Type: Deficiency
Create Date: 2023-04-16T22:01
Description: Request for Proof of Sharp Edges

CASE PROFILE

Case Name: Johnson, Sutton and Golden Settlement
Case ID: 2
Case Status: Notice

SUB-CAMPAIGNS

ID	Date Created	Title	Medium	Date Scheduled	Vendor	Database Name	Database Purpose
12	2023-04-16T22:01	Batch #1 of Emails (5,000)	Email	2023-04-04T17:00		angeion_dev	Claim
17	2023-06-25T15:54	Email Notice Test 1	Banner Ad	2023-06-28T17:00	Huntington Bank	angeion_dev	Claim

Close

Actions

In the above window, you'll be shown basic information about the master campaign along with all of the sub-campaigns.

To add a new one, click Actions button on the right and "Add Sub-Campaign." Fill in the fields required (help blurbs are on each line) and submit the campaign. Take note of the sub-campaign ID returned as that will be needed for Data team to load the data to that campaign.

Administration

Cases

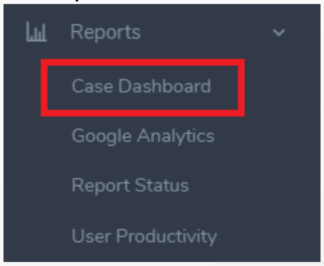
Adding a Group to a Case

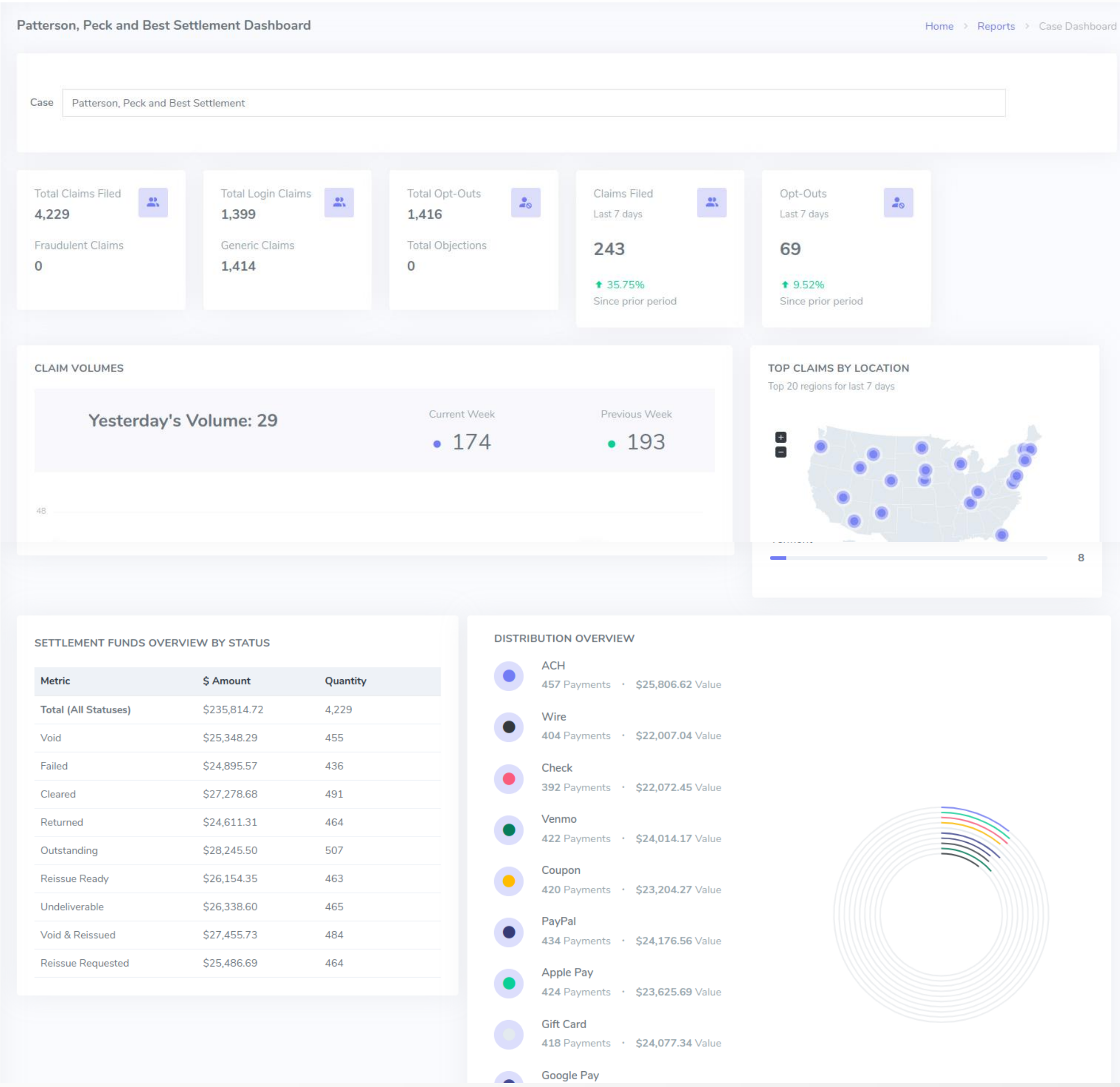
1. Go to the Cases module
2. Find your case that you would like to give a group access to
3. Click the Review button
4. In the section titled "Groups with Access" click the 3 dots and "Add Group"

Adding a Group to a Dashboard

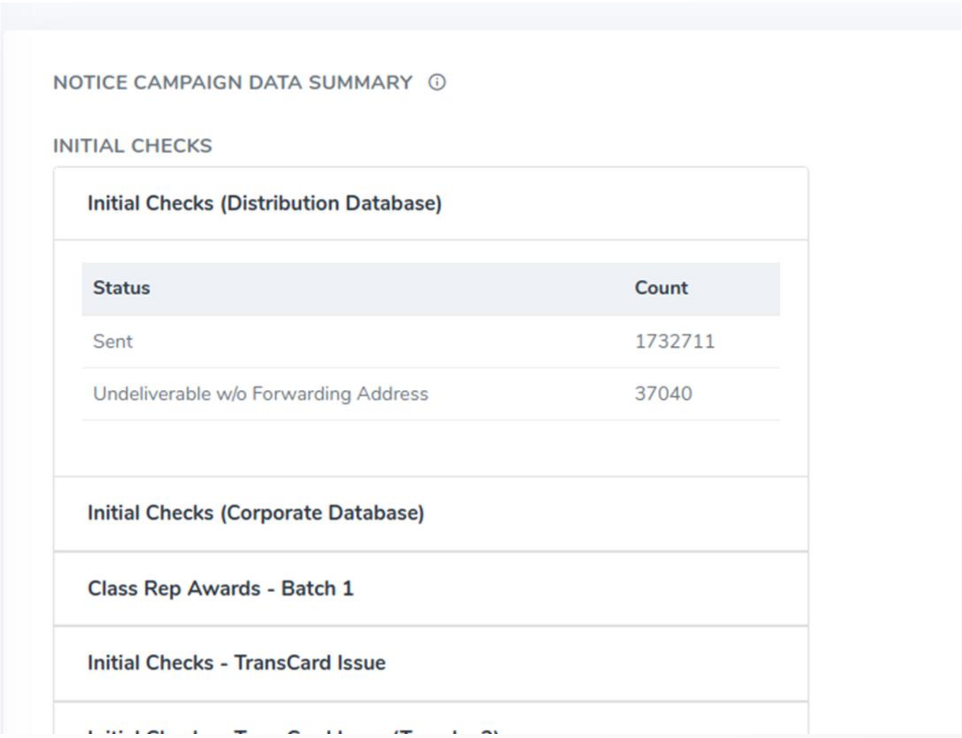
1. Cases->Your Case->Groups->Add Group
2. Go to Reports
3. Open drop down menu and click Case Dashboard

Example Below:





Delivery stats are compiled in the case dashboard. Skip trace numbers, deliverability numbers etc. By can be found near the bottom of the screen.



NOTICE CAMPAIGN DATA SUMMARY

INITIAL CHECKS

Initial Checks (Distribution Database)

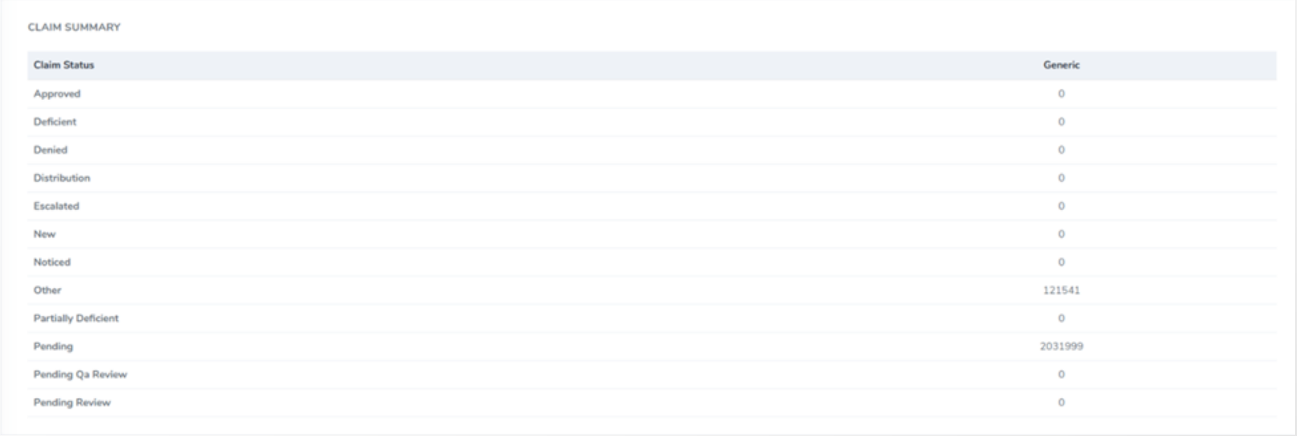
Status	Count
Sent	1732711
Undeliverable w/o Forwarding Address	37040

Initial Checks (Corporate Database)

Class Rep Awards - Batch 1

Initial Checks - TransCard Issue

There is also a claim summary card by status and claim type with Other being a catch all for non-standard claim statuses.

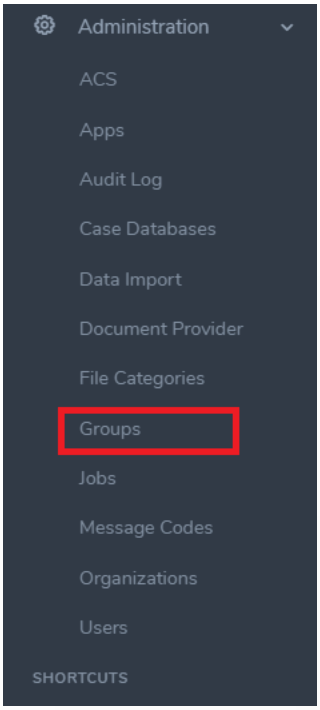


CLAIM SUMMARY

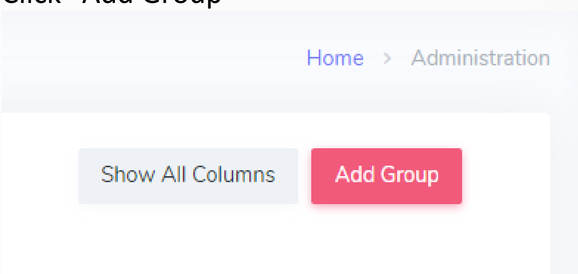
Claim Status	Generic
Approved	0
Deficient	0
Denied	0
Distribution	0
Escalated	0
New	0
Noticed	0
Other	121541
Partially Deficient	0
Pending	2031999
Pending Qa Review	0
Pending Review	0

Groups

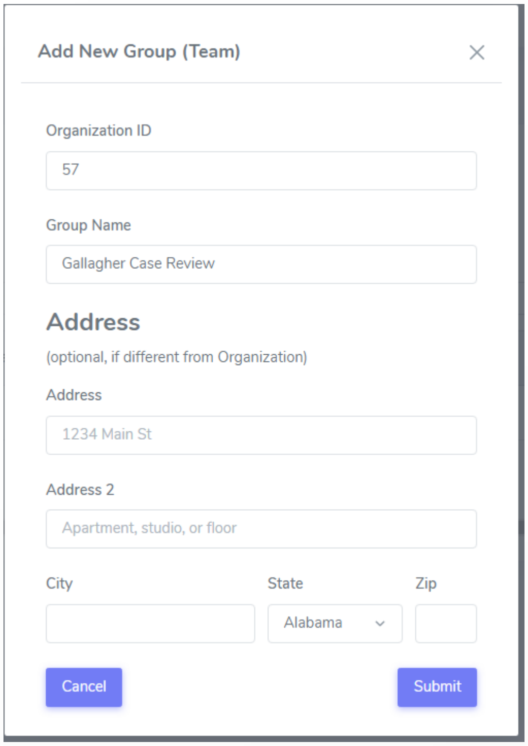
Access is controlled by group membership.



Click “Add Group”

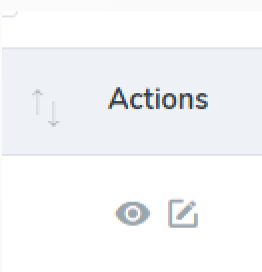


Enter information on the group. Address is optional and the system will use the address of the organization if it is not set.

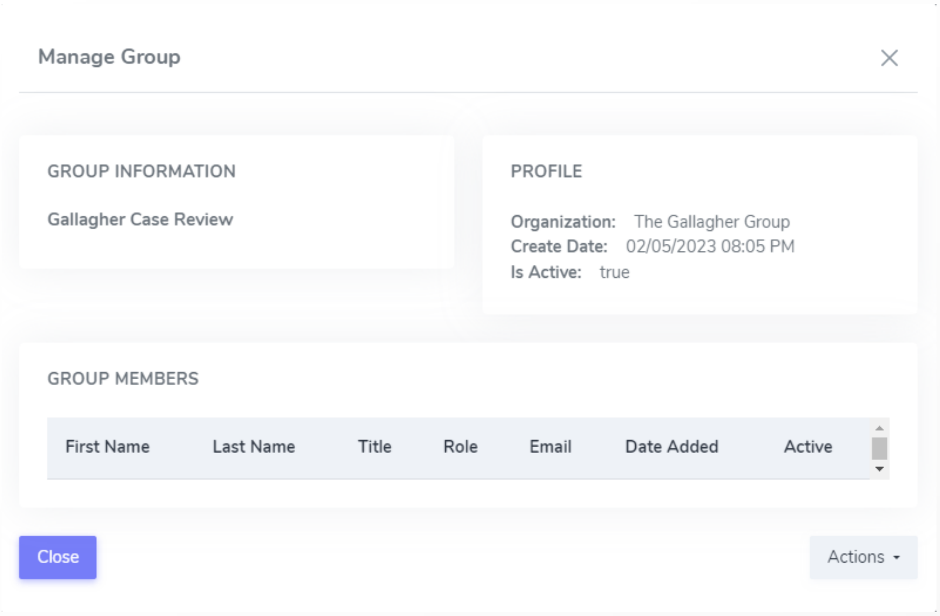


Adding a User to a Group

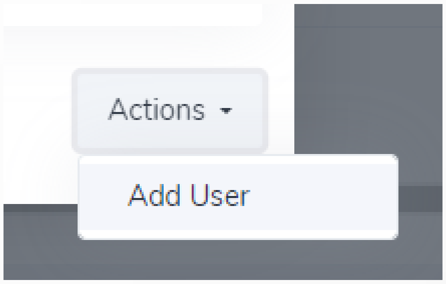
Find the group and click the “View Details” (eye) button



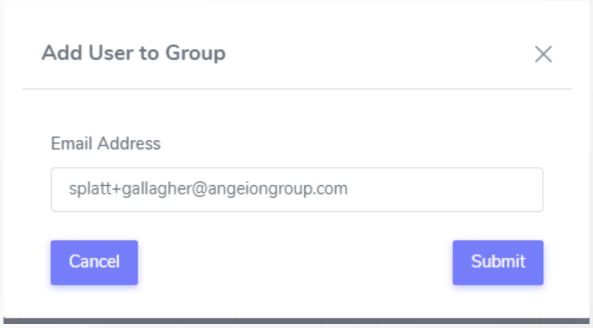
This will display the View Details modal which has controls to manage the group:



Click Actions->Add User

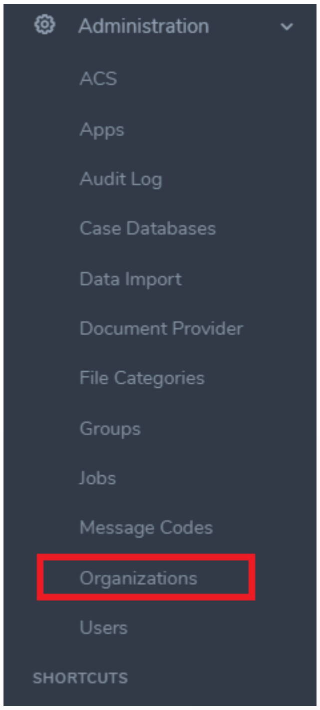


Add User to Group:



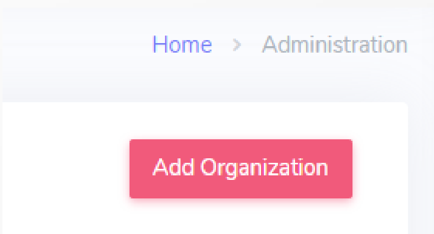
Organizations

Organizations can be found by navigating to:

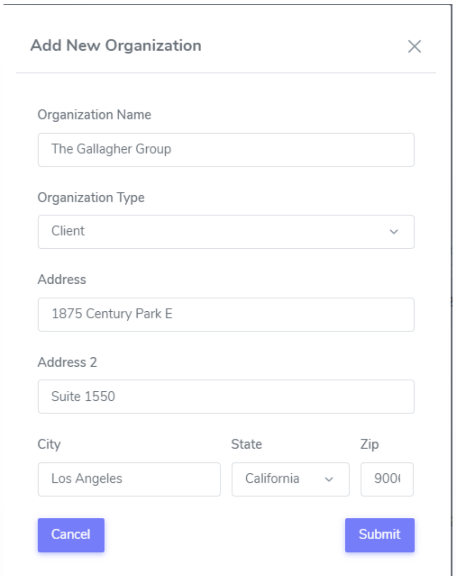


Adding an Organization

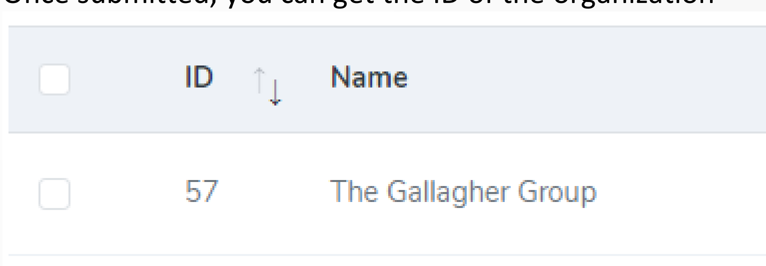
1. Navigate to Administration->Organizations
2. In the main window, locate the “Add Organization” button:



3. Fill in the information for the organization, including an address

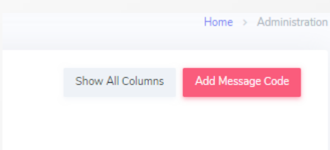


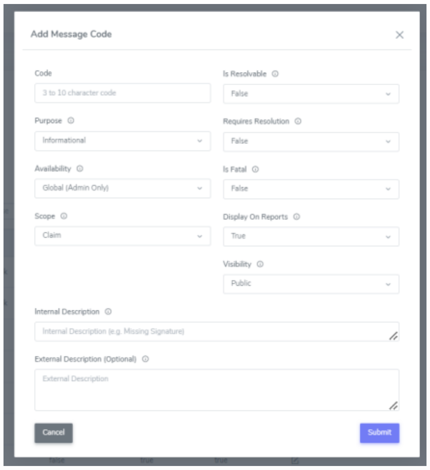
4. Once submitted, you can get the ID of the organization



Message Codes

- Administration -> Message Codes
    - Create/Edit global message codes
- Case -> Cases -> Case Name -> Available Message codes
- Adding message codes to a case Case-Cases- [Case Name] - Avialble Message Code - to assign the "Global" Message code that can be used for the case





- Message Codes can be Max of 30 characters long
- There are CM Task message codes and System Task
  - CM Task needs to be cleared by Class Member
  - System Task is run by a Job and does not require Class Member involvement
- If there are no message codes to Apply Message Code in View Claim (Claim Review) this means message codes have not yet been added to the case
- Message codes that have already been created will prepopulate for cases that the specific code has been added to under Claim Review

Data Import

Courtex supports the import of bulk data for Claim Status and Contact History through the Data Import module.

Contact History

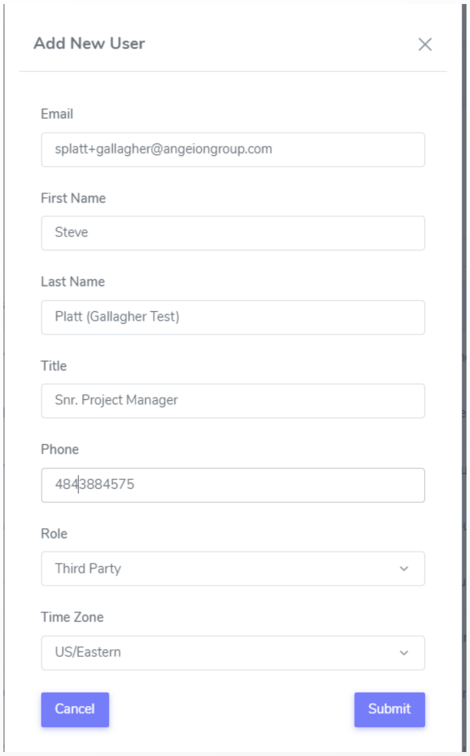
- Click Upload Contact History
- Provide the requested information on the import form and click Next to go to the Import Wizard.
- The Import Wizard requires the following 4 columns on the CSV/Excel file: 00 ID, address, contact_method and contact_status. A description of the columns is provided on the first step of the wizard. Click Next Step once you have ensured that the import file contains all the required fields.
- Import the file by either dragging and dropping it into the upload box or clicking on the upload box and navigating to the file. Once uploaded, click Next Step.
- The Import Wizard will attempt to identify the columns. Double check that the columns are correct. If any are incorrect, click the dropdown box next to the column and select the correct column. If all columns are correct, click Next Step to finish importing the data.

Users

Creating New Users

Users can be added in Administration->Users (if role allows access).

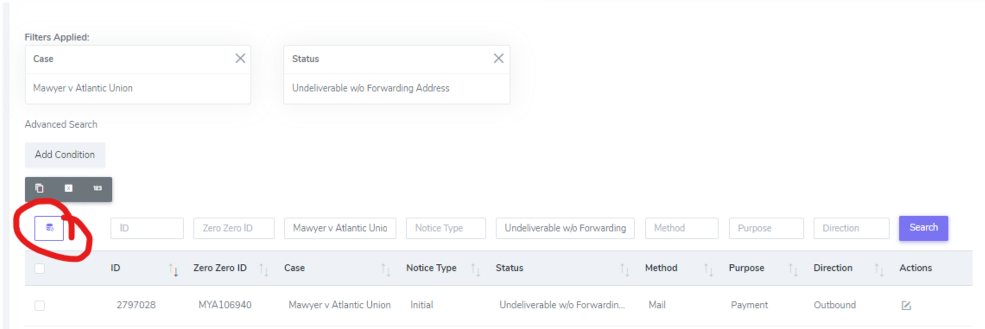
IMPORTANT: When setting up accounts for external users, use the “Third Party” role as it defaults to no permissions to view data and requires being added to a group and a group to be associated to a case to view data.

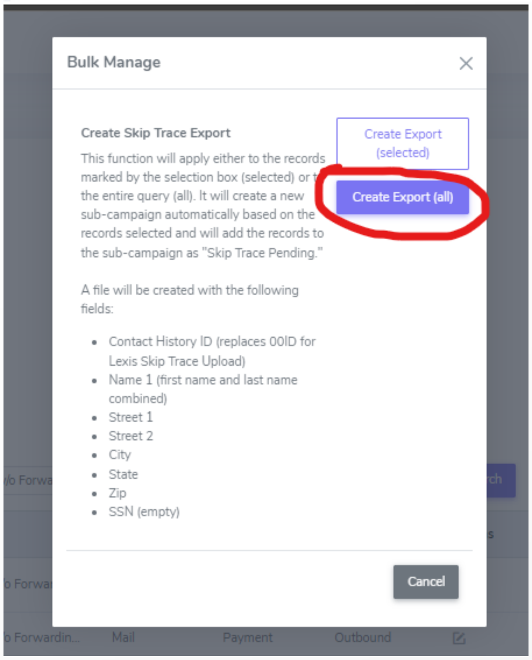


Skip Tracing

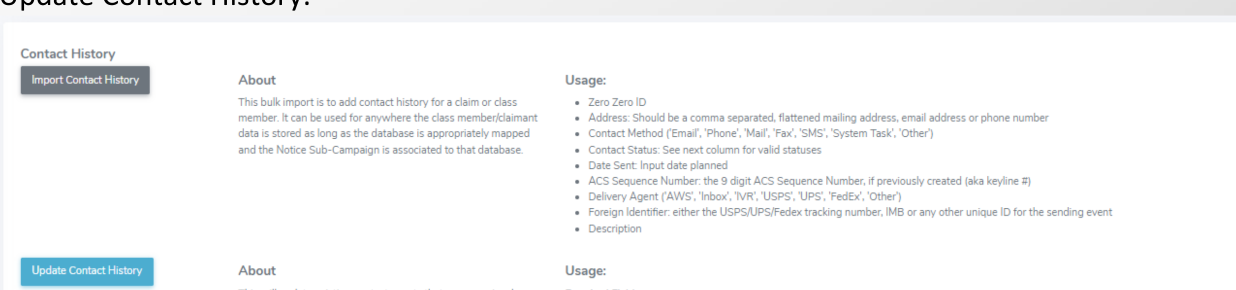
1. In Contact History query:
   a. Case Name
   b. Status (undeliverable w/o forwarding address)
   c. **Date Resolved = EMPTY. This is required if this is not the 1st skip trace so that you don't skip trace something that is already resolved.**
2. Obtain PO#

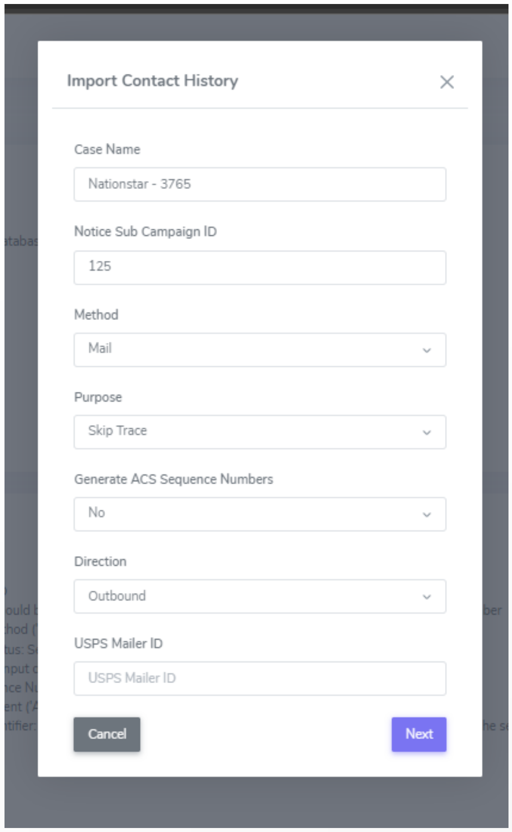
3. Pull **Bulk Update** file (not CSV). This will automatically create a sub campaign in Courtex.

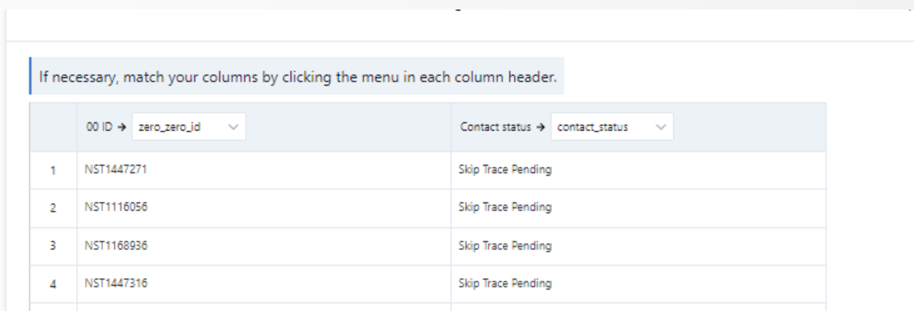




4. Save file with the following naming patern:
   a. **Initials_Dept#_PO#**
   b. *i.e. ACC_3809_AN18070*
5. Send to Lexis
6. Retrieve completed skip trace and rejected (*see next slide*) files from Lexis.
7. **You can now open the file due to changes with Lexis.**
8. Open the file and mark any blank status with an "X". These should also correspond to the "rejected" file.
9. Update Contact History.

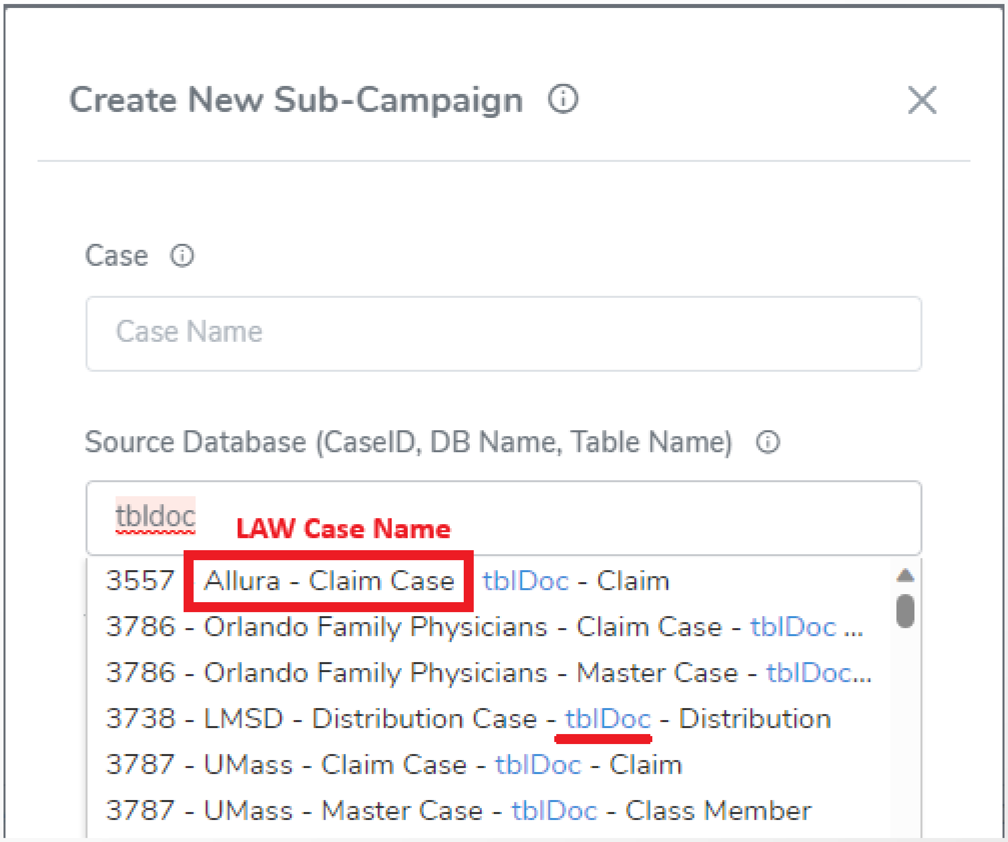




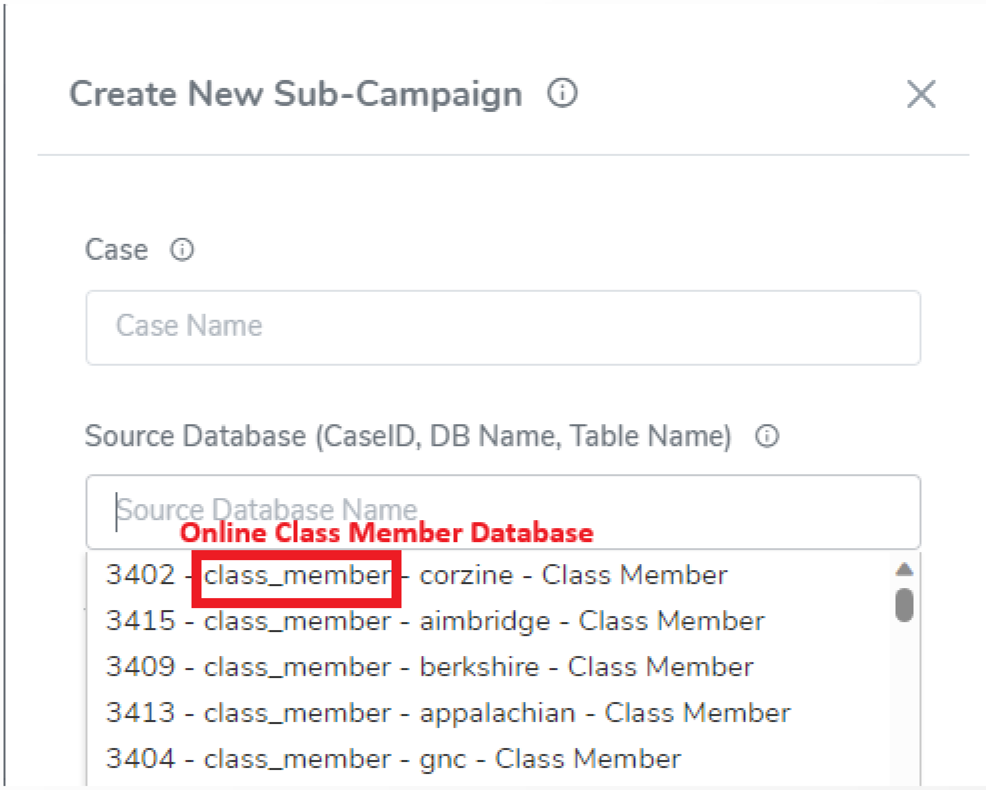


10. Confirm that all records were successfully updated.
11. Look up Sub campaign number
12. Two queries in Contact History
    a. 1st query:
        i. Case name
        ii. Status – Skip Trace Hit
        iii. Sub Campaign Number
    b. 2nd query:
        i. Case name
        ii. Status – undeliverable w/forwarding address
13. Combine the two files. This is your reissue file

14. From the previously created reissue file, create a separate file to Update Payments status.
    a. Copy 00 ID and paste into blank spreadsheet
    b. Add a status column “reissue ready”
15. Update Payments
16. In Payment module query:
    a. Case
    b. Status - Reissue Ready
17. Export File
18. Create Sub Campaign



19. Incorrect example (DO NOT USE THESE!!!):

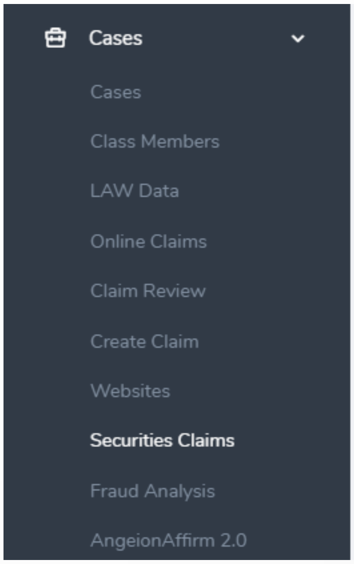


20. Update Contact History for Check Reissue
21. Add barcodes to orignal file.
22. Pull PO's for printing and postage.
23. Submit ticket to Accounting for reissue.

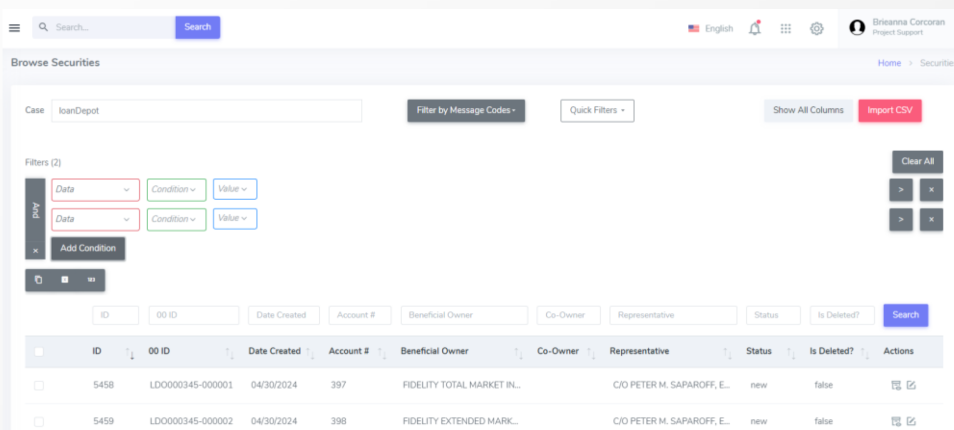
Securities

To Browse

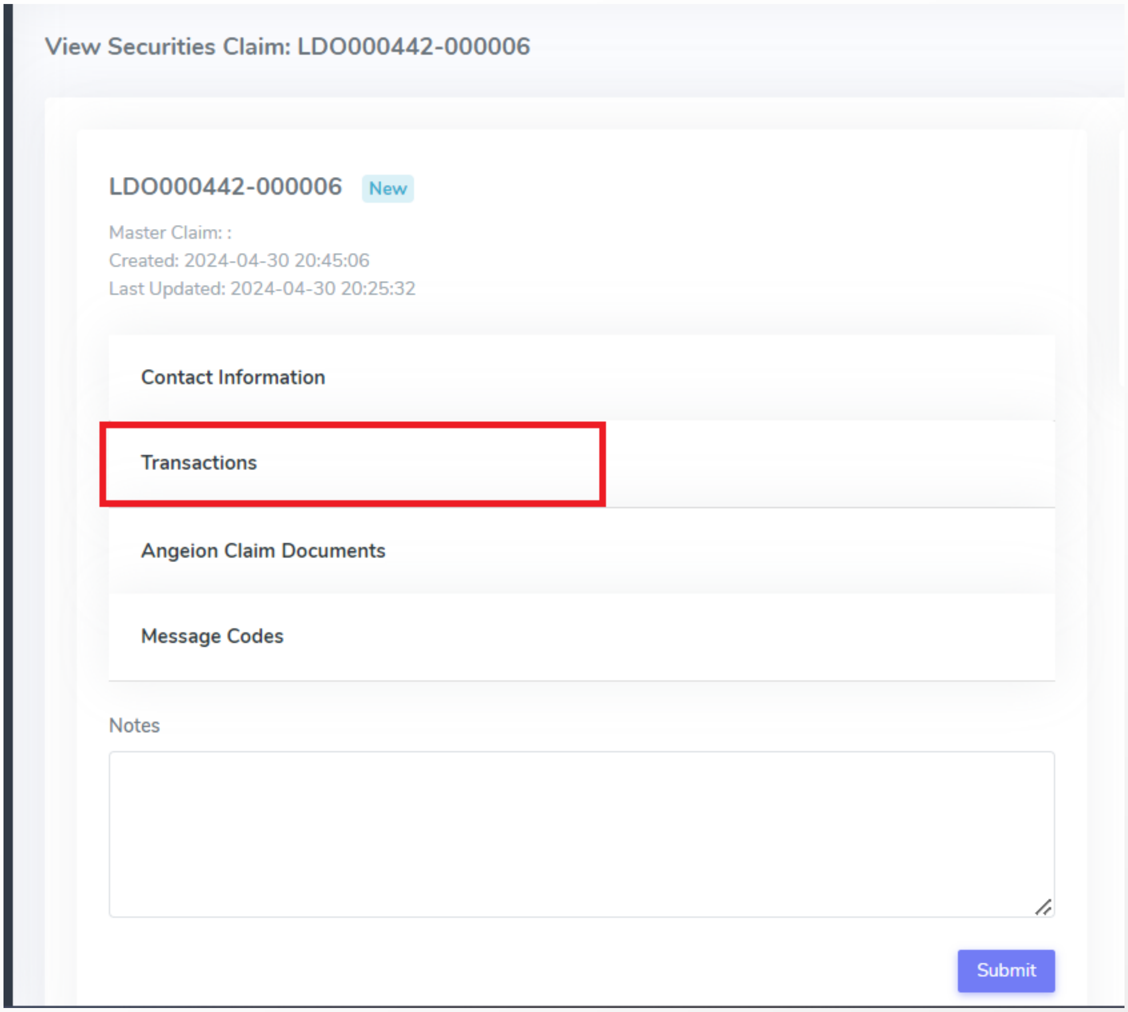
- **Cases -> Securities Claims -> Browse Securities**



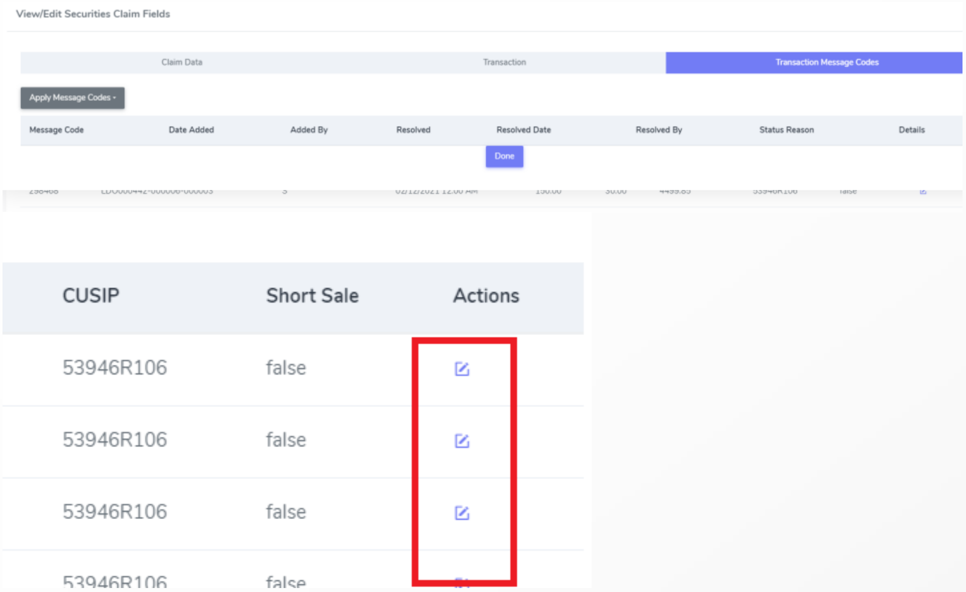
- Securities Claims Browse Page /securities/browse
- Securities Claims View Page /securities/view/claim/<zero_zero_id>



- Modal to view all related transactions in Securities Claims View Page


View Securities Claim: LDO000442-000006
LDO000442-000006
New
Master Claim: :
Created: 2024-04-30 20:45:06
Last Updated: 2024-04-30 20:25:32
Contact Information
Transactions
Angeion Claim Documents
Message Codes
Notes
Submit

- Modal to edit single securities transaction and apply Message code in Securities Claims View Page



ANGEION GROUP
Changing the Rules

V20241107.001