Bulk Document Submittal Instructions

Bulk Document Submittal is available for submittal of documents for groups of claimants; however, each claim form has a document upload function that can be utilized by the individual and/or the firm.

Please review the information that follows closely and in its entirety. If you have questions regarding bulk document submittal, please send your questions via email to endopitrust@endopitrust.com (preferred) or call 855-637-5538, and we will be glad to assist.

# Content/Use Options

**DUE TO THE SHORT CLAIM SUBMITTAL/PROCESSING WINDOW THE TRUST WILL NOT RECEIVE DOCUMENT UPLOADS WITHOUT IMPORT TABLES** (i.e. The Trust will not key the import tables for the firm). Bulk Document Submittal can be utilized for any combination of the following purposes:

* Full document submittal of completed claim forms as well as required forms and supporting documentation to accompany a Bulk Data Import of claim data.
* Partial document submittal where the claim form is completed by the individual and/or the data is submitted via Bulk Data Import and the firm is providing the required forms and documentation.

# Submittal Process

Due to the sensitivity/privacy of the information being passed, documents must be submitted securely; therefore, the following must be used:

* + Dropbox folder provided by our firm
		- Setup Requirements – Email the following to endopitrust@endopitrust.com
			* Firm Name
			* Email of those that should have access to the Dropbox
				+ Access can be removed/added as needed
* Firm created SFTP share file.

**Submittal Folder Naming Format**

Regardless of the submittal process used, document submittals should be grouped by the date submitted and the following format should be used for the folder name - YYYY.MM.DD.

The data file (see Bulk Data Import Instructions) being submitted with the documents should be uploaded in the folder with the related documents.

# File and Sub Folder Naming Format

The file naming format is **Last, First of the Injured Party** for documents uploaded.

Multiple individuals’ documents can be submitted in a single folder or can be grouped into folders for each individual (the folders should have the same Last, First naming format).

**After** the required Last, First naming format, you can use other “add-ons” to the file name as needed to separate individuals with the same name and/or identify them better within your firm. These add-ons might include middle name/initial, client ID, document type, etc.