Bulk Data Import Template Instructions

Download the Excel **MNK Non-NAS Import Template** or the **MNK NAS Import Template** to import data for each claim form type. The Excel spreadsheet is formatted to provide predefined columns for all the fields included in each of the claim forms. The data fields can be populated manually, or data can be copied and pasted from other reports or databases if the information matches the format referenced in row 2 - Ex. varchar(50), char(2), datetime, etc.

Please review the information that follows closely and in its entirety before utilizing the templates. If you have questions regarding the use of the import templates, please send your questions via email to mnkpitrust@mnkpitrust.com (preferred) or call 855-637-5538, and we will be glad to assist.
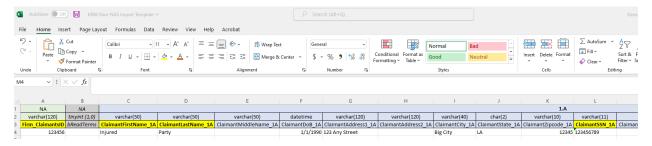
Template Types

- MNK Non-NAS Import Template
- MNK NAS Import Template

Header Rows

- Row 1 = Claim Form Part/Section
  - Ex. 1A = Part 1, Section A
- Row 2 = Required Data Format and Field Length
  - Ex. varchar(120) = letters, numbers and special characters up to 120 characters and spaces
- Row 3 = Field Content

Required Fields

These fields are located in the template specified under the columns noted and are **bold** and highlighted in yellow on the template. The example below is from the MNK Non-NAS Import Template for living Injured Party.

- Firm Client ID
    - MNK Non-NAS Import Template <u>and</u> MNK NAS Import Template
        - Firm_ClaimantsID (column A)
            - If your firm does not have a unique client ID number, then use the SSN *without* dashes.

- **Injured Party** First Name, **Injured Party** Last Name, and **Injured Party** SSN/SIN
    - MNK Non-NAS Import Template
        - If the Non-NAS **Injured Party is Living**
            - ClaimantFirstName_1A (column C)
            - ClaimantLastName_1A (column D)
            - ClaimantSSN_1A (column L)

            - OR -

        - If the Non-NAS **Injured Party is Deceased**
            - OpioidUserFirstName_1B (column Q)
            - OpioidUserLastName_1B (column R)
            - OpioidUserSSN_1B (column W)
    - MNK NAS Import Template
        - If the NAS **Injured Party is Living <u>or</u> Deceased**
            - NASChildFirstName_1A (column C)
            - NASChildLastName_1A (column D)
            - NASChildSSN_1A (column L)

<u>Content/Use Options</u>

The Bulk Data Import can be submitted for any combination of the following purposes:

- **Full data upload** to complete the claim forms for your clients to then log in and review the data uploaded and submit/sign the claim form.
- **Personal Information (Part1) and claim related data upload** for your clients to then log in and review the data uploaded, complete the insurance (Medical Lien Part) and medical provider/birth facility (for NAS) information, and submit/sign the claim form.
- **Personal Information (Part 1) upload** for your clients to then log in and review the data uploaded, complete the remainder of the information, and submit/sign the claim form.

Submittal Options

- New Claimant Data – Data for claimants that **have not** been previously uploaded or completed a claim form independently.
- Claimant Data Updates – Data updates for claimants that have been previously uploaded or completed a claim form independently.
    - The data update can include additions/changes/corrections to **all** data *until the claim form has been signed.*
    - *Once the claim form is signed* **only** Personal Information, Medical Provider and Medical Lien data can be added/changed/corrected.

File Naming Format

- New Claimant Data
    - MNK Non-NAS YYYY.MM.DD – New
    - MNK NAS YYYY.MM.DD – New
- Claimant Data Updates
    - MNK Non-NAS YYYY.MM.DD – Update
    - MNK NAS YYYY.MM.DD – Update

Submittal Process

Due to the sensitivity and regulations around the data being passed, files must be submitted securely; therefore, one of the following must be used:

- Dropbox folder provided by our firm
    - Setup Requirements – Email the following to mnkpitrust@mnkpitrust.com
        - Firm Name
        - Email of those that should have access to the Dropbox
            - Access can be removed/added as needed
- Dropbox link provided by your firm
    - Please email the link to mnkpitrust@mnkpitrust.com and ensure the email references your firm name.
- SFTP link or similar secure transmission
    - Due to the varying SFTP options available, the establishment of the SFTP would be facilitated by the firm with access provided to our firm.
    - If this is an option that you would like to utilize, please email the basic information about the protocol you will be using (type, how accessed, etc.) to mnkpitrust@mnkpitrust.com, and we will set up a call to discuss further and establish next steps to get the connection made.

Regardless of the submittal process used, if the data file <u>will be</u> accompanied by supporting documentation (see Document Submittal Instructions), the file and related documents will need to be separated into folders by submittal date using the following format for the folder name - YYYY.MM.DD.

Access to Records Within the Portal

As a reminder, all claims, data, documentation, etc. related to a submittal is based off of the **Injured Party** (Non-NAS = the opioid user and NAS = the child).

Individual access to the portal, whether by the Injured Party or the Claimant/Representative, utilizes the Injured Party's last name as the User ID and the 9-digit SSN/SIN <u>without dashes</u>, for the password.

The first time the individual goes into the portal, they will log in as a New User using the Injured Party's last name and SSN/SIN. If data has been imported by a firm for them, upon entry, they will verify the firm and proceed into the applicable claim form. When returning to the portal at any time after the initial New User log in/entry, they will log in as a Returning User using the same Injured Party's last name and SSN/SIN information.

Firm access for their client claims in the portal will be created as bulk data imports, documentation submittals and/or requests for access are received.

Additional Notes

- Injured Party SSN or SIN is <u>required</u> for import as the unique SSN/SIN is used in multiple validation steps. If you have a claimant that does not have a SSN/SIN, please email <u>mnkpitrust@mnkpitrust.com</u> to set up a time to discuss the situation and determine next steps.
- The SSN/SIN related columns are formatted as text to ensure that the leading zeros are picked up. If you are copying/pasting from another table, please ensure that the columns are formatted as text and reflect the leading zeros where applicable.
- Please only submit **one** Non-NAS and/or NAS import file per day to ensure that files are not overridden at submittal/upload.