

FAQs: Trio Transition



What is happening to Trio?

On January 12, The Trio Solution brand is being retired, but the services and support teams you know from Trio are moving to MoveDocs. You'll get the same great services, plus access to a whole lot more on the MoveDocs platform.

What is MoveDocs?

MoveDocs is a personal injury solutions platform designed to help law firms and providers maximize outcomes and minimize costs as they work to achieve the best results for their clients. MoveDocs streamlines plaintiff medical, plaintiff funding from Oasis Financial, and expert services from ExpertPays on a cloud-based platform that integrates with most major case management software.

What is happening to my Trio Team?

For the most part, customers will continue to work with the same team members they're accustomed to. In some circumstances, new team members will be assigned. In both cases, your current reps will reach out to make sure you know about any changes. Our operations support teams are aligning around firms and geographies to create greater familiarity and consistency. We will introduce your teams soon.

How will I access my Trio cases when the Trio portal shuts down on January 12?

On January 12, the Trio portal will no longer be available, but all existing case information will be accessible on MoveDocs once you request access. To get a login to MoveDocs, you just need to request access and complete a brief demo, so we can show you how the new platform works. You can request access by visiting movedocs.com/trio or by contacting your current Trio representative.

How will I access my cases on MoveDocs?

Once you have access to MoveDocs, simply visit the '*Client Cases*' tab. You'll find each case listed alphabetically by plaintiff name, along with all case details. You can also search by plaintiff name to find individual cases.

How do I access MoveDocs and train my team?

You can request access by visiting movedocs.com/trio or by contacting your current Trio representative. When you schedule your demo meeting, just let us know the names and emails of all team members, and we'll be sure they're provided access and included in the training.

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How do I initiate services for a new client in need of care?

You can call your current rep, just as you do today to get a new client started, or you can click on 'Add New Client' on MoveDocs and follow the prompts. It's that simple.

What can I find on the platform?

Everything you had on the Trio portal and more!

- Search an interactive provider map with 10,000+ provider options nationwide
Download client bills and records, generate chronology reports and balance requests,
- and submit payoff request
- View, track, and help your client initiate Plaintiff Funding Requests from Oasis Financial
- Request Expert Services from ExpertPays
Integrate all documents and alerts into your Case Management Software platforms for free.
- MoveDocs integrates with Filevine, CasePeer, Litify, Clio, Smart Advocate, and more.

You can learn more at movedocs.com/trio

Where do I submit payments?

There is a new lockbox for payments. All payments for current cases contracted through The Trio Solution should be sent to the following addresses:

Standard Mail Lockbox Address

GLOBAL FINANCIAL SPV1
PO BOX 932513
CLEVELAND, OH 44193

Overnight/Courier Lockbox (include all information below)

GLOBAL FINANCIAL SPV1
LOCKBOX NUMBER 932513
CLEVELAND, OH 44135

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Who do I contact for help?

You can always call your rep for help, and here is a list of specialized support by function:

Department	Phone Number	Email
Onboarding & Getting Started	(866) 611-5609	onboarding@movedocs.com
Scheduling & Procedure Status	(866) 611-5609 Ext. 2	scheduling@movedocs.com
Record & Billing Requests	(866) 611-5609 Ext. 4	recordrequests@movedocs.com
Balance Requests	(866) 611-5609 Ext. 4	balancerequests@movedocs.com
Payoff Requests	(866) 611-5609 Ext. 5	payoffs@movedocs.com
To Provide Case Status	(866) 611-5609 Ext. 6	statusing@movedocs.com
Affidavit Requests	(866) 611-5609 Ext. 4	firmrequests@movedocs.com