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E-Subro Hub My Tasks List Reference Guide

January 2023

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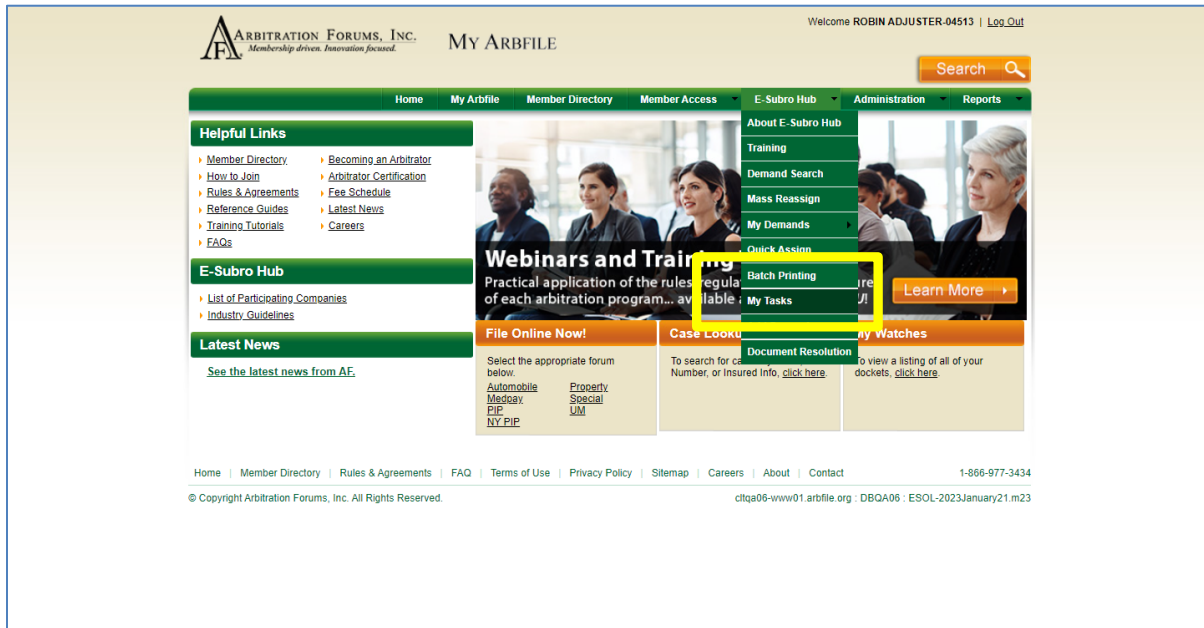
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My Tasks List

The ability to see the “My Tasks List” menu option requires a company-wide configuration setting and is available to all users if active for the company.

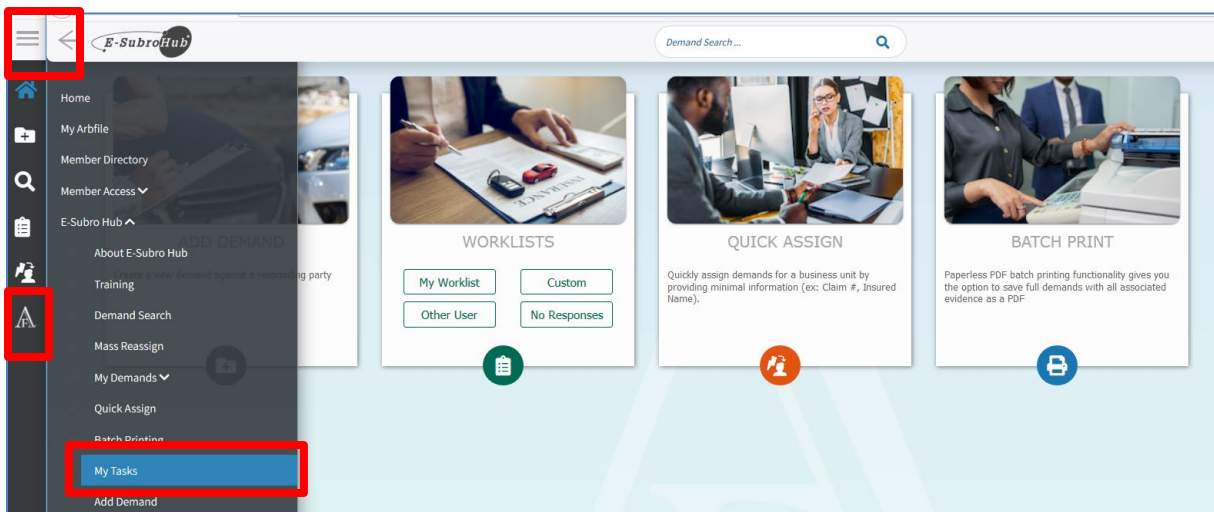
My Arbfile Page

From the My Arbfile page, click the E-Subro Hub dropdown menu, then “My Tasks.” This would be the most common path to start a My Tasks List session, but there are other locations on the E-Subro Hub platform.



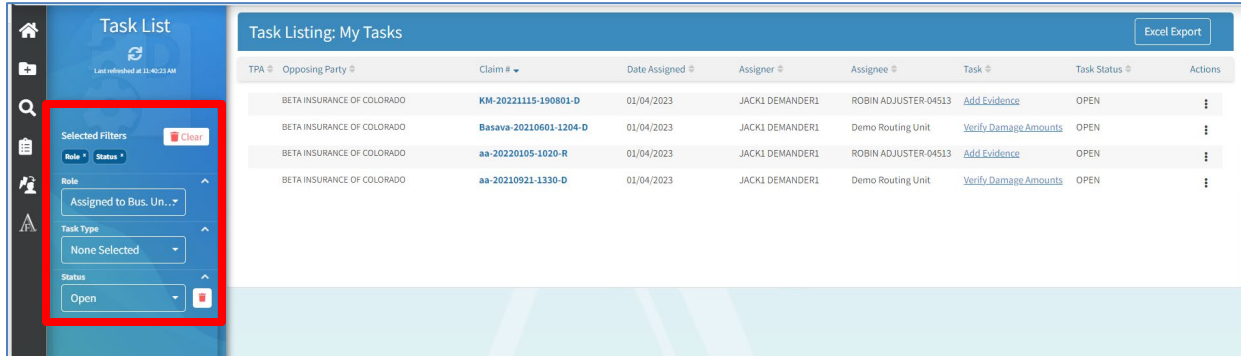
Menu Links

There are menus that will present a My Tasks link. The AF logo on the side menu and the “hamburger” menu at the top left corner will open a menu tree with the “My Tasks” option.



Task List Page

This page will show the demands that have a pending task for the user. The default filters for this list are tasks assigned to an associated business unit or the claim handler directly. The status of the task would be “Open.”



The screenshot shows the 'Task List' interface. On the left is a sidebar with a 'Selected Filters' panel containing three filter options: 'Role' (set to 'Assigned to Bus. Un...'), 'Task Type' (set to 'None Selected'), and 'Status' (set to 'Open'). The main area displays a table titled 'Task Listing: My Tasks' with an 'Excel Export' button. The table has columns for TPA, Opposing Party, Claim #, Date Assigned, Assigner, Assignee, Task, Task Status, and Actions. The table contains four rows of task data, all with a status of 'OPEN'.

TPA	Opposing Party	Claim #	Date Assigned	Assigner	Assignee	Task	Task Status	Actions
BETA INSURANCE OF COLORADO		KM-20221115-190801-D	01/04/2023	JACK1 DEMANDER1	ROBIN ADJUSTER-04513	Add Evidence	OPEN	⋮
BETA INSURANCE OF COLORADO		Basava-20210601-1204-D	01/04/2023	JACK1 DEMANDER1	Demo Routing Unit	Verify Damage Amounts	OPEN	⋮
BETA INSURANCE OF COLORADO		aa-20220105-1020-R	01/04/2023	JACK1 DEMANDER1	ROBIN ADJUSTER-04513	Add Evidence	OPEN	⋮
BETA INSURANCE OF COLORADO		aa-20210921-1330-D	01/04/2023	JACK1 DEMANDER1	Demo Routing Unit	Verify Damage Amounts	OPEN	⋮

Task List Filter

There are three filter options for the Task List.

Role can be set to “Assigned to Me,” “Assigned to Business Unit or Me,” or “I am the Assigner.”

Task Type can be set to “Add Evidence” or “Verify Damage Amounts.”

Task Status includes several options.

Open: The task is pending.

In Process: The task has been reviewed, but not marked as complete.

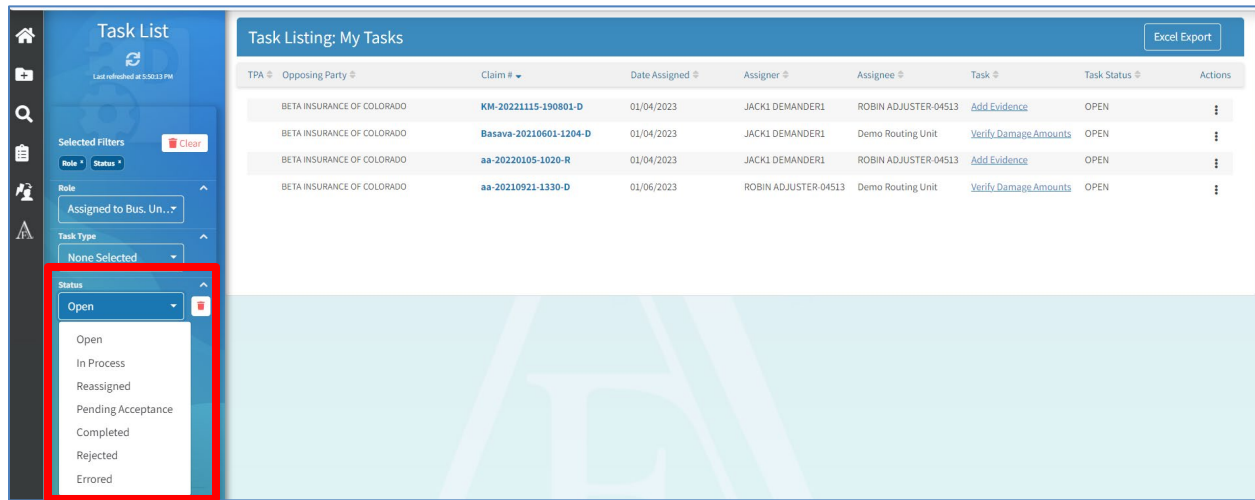
Reassigned: The task was reassigned from the original recipient

Pending Acceptance: The demand has been moved to this status due to a Settlement Exchange System[®] (SES[®]) trigger event.

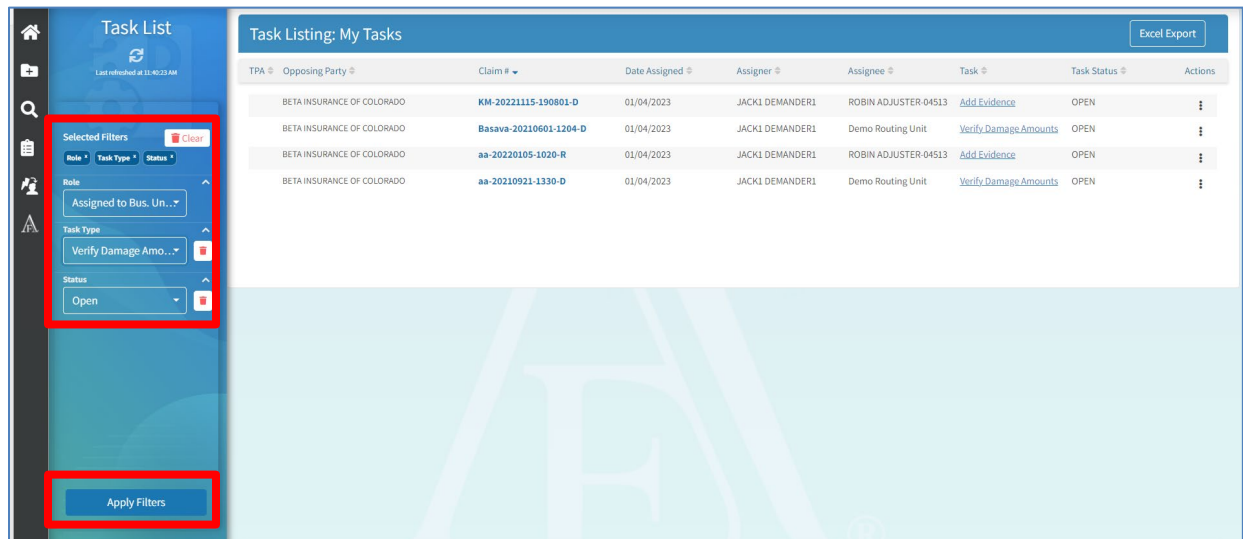
Completed: The task has been marked complete.

Rejected: The task has been declined by the assigned user and generally involves a TPA workflow.

Errored: An evidence upload malfunction has occurred.



Click “Apply Filters” if the options are revised to create a different list. Selected filters can be removed with a single click of “Clear.” Individual filters can be removed by clicking the corresponding trash can icon.



Task List Columns

There are nine columns on the “Task List” page and can be sorted by clicking at the top of the column.

TPA: This indicates the demand is currently assigned to an administrator.

Opposing Party: This is the other party that is involved in the claim.

Claim Number: This is the claim number that was entered for the user’s internal file and is an active link to open the demand.

Date Assigned: This is the date the task assignment was initiated.

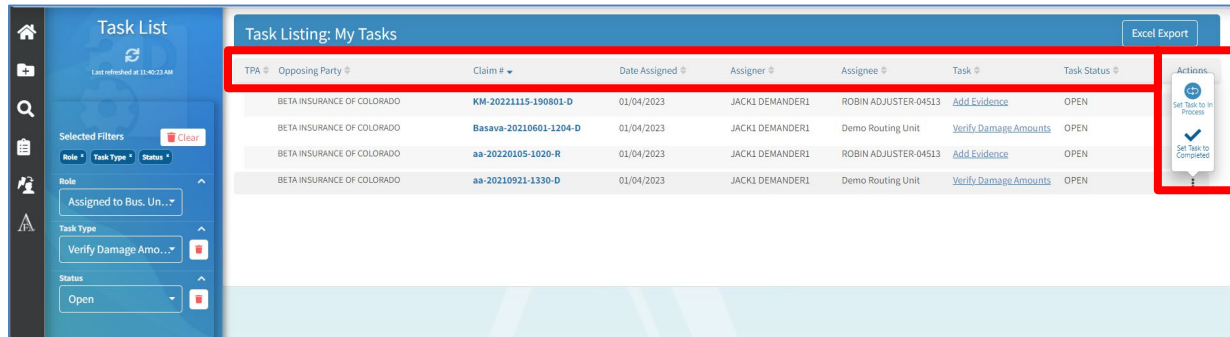
Assigner: This is the person who initiated the task assignment.

Assignee: This is the person or business that was assigned the task.

Task: This is the task that was assigned. This is an active link to the location where the task can be reviewed and marked complete.

Task Status: This shows the current status of the assigned task and corresponds to the Status filter options.

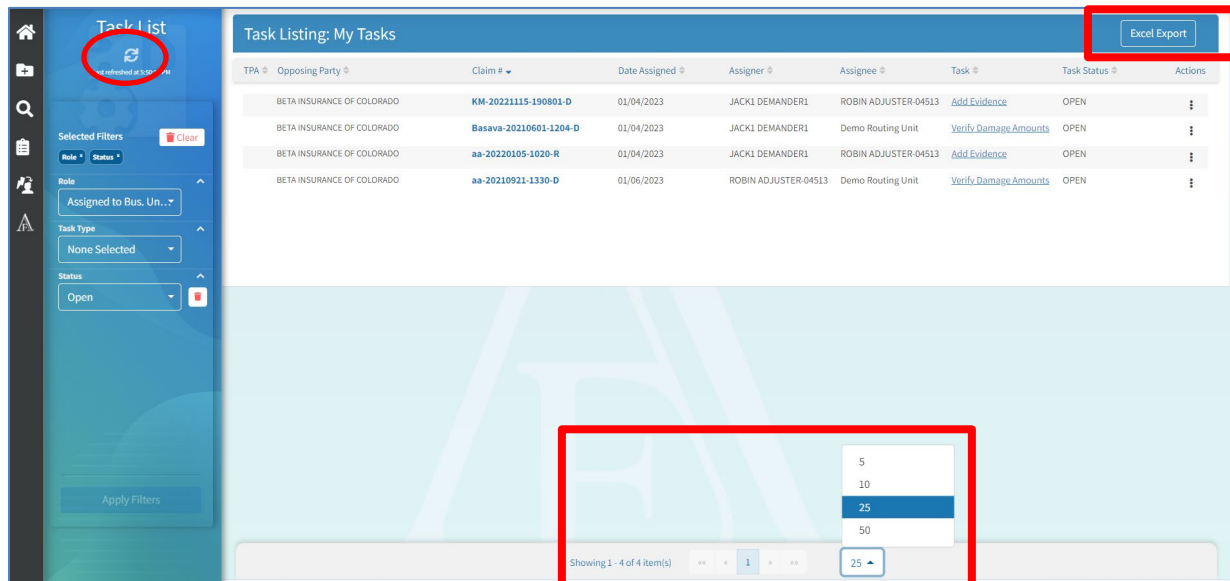
Actions: This is a quick link to change the status of the assigned task.



The top ribbon has a link to export the Task List to an Excel document.

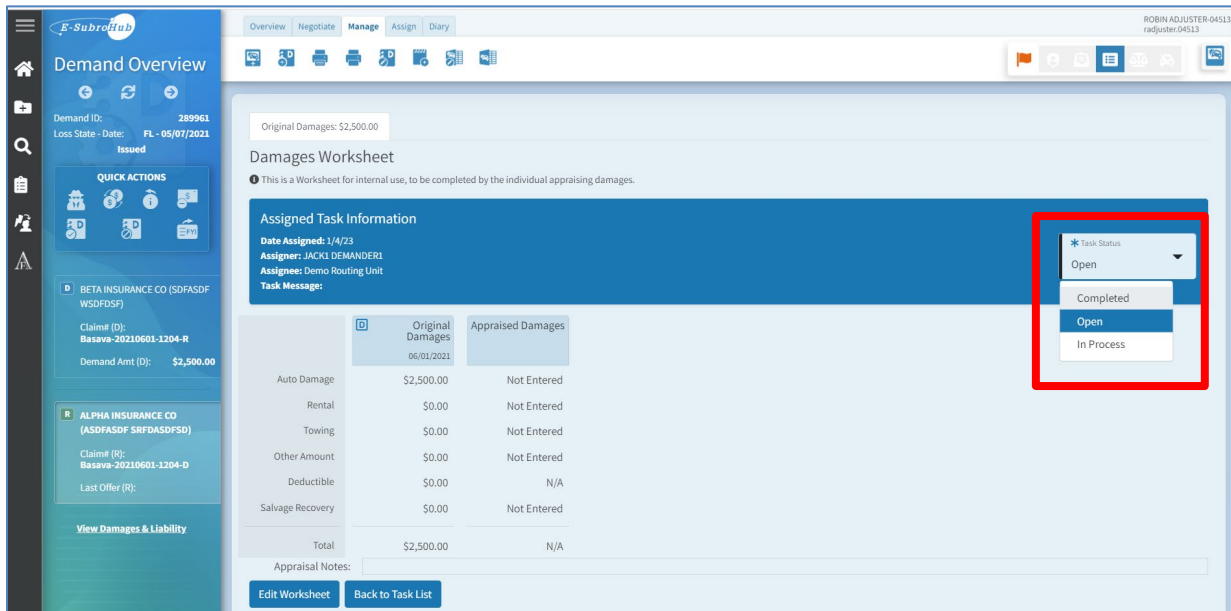
The “Refresh” icon will update the “Task List” page.

The bottom ribbon will show the current page for the list. The number of demands per page can be set to 5, 10, 25, or 50.



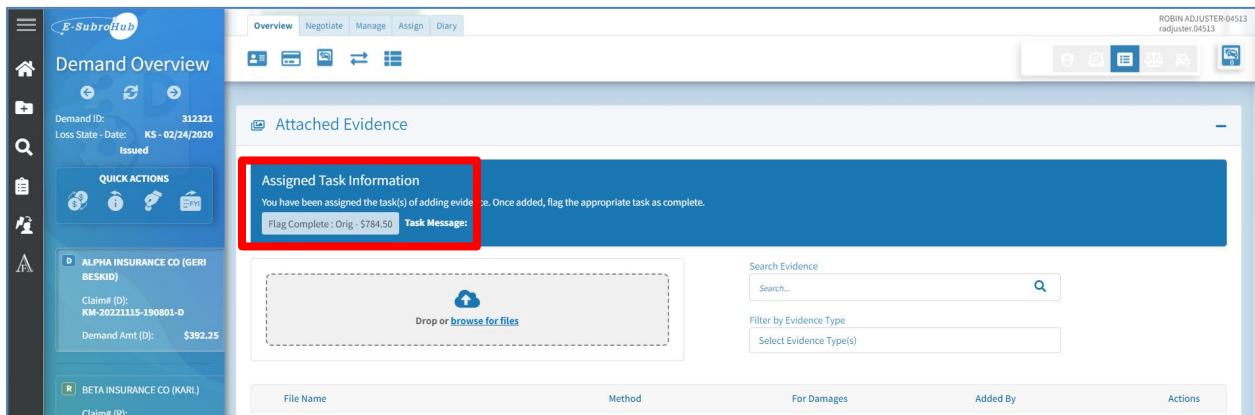
Verify Damage Amounts Task

The “Verify Damage Amounts” task can be completed by clicking the “Task” column link to the “Damages Worksheet” page. However, use of the actual worksheet would be an internal PD review workflow.



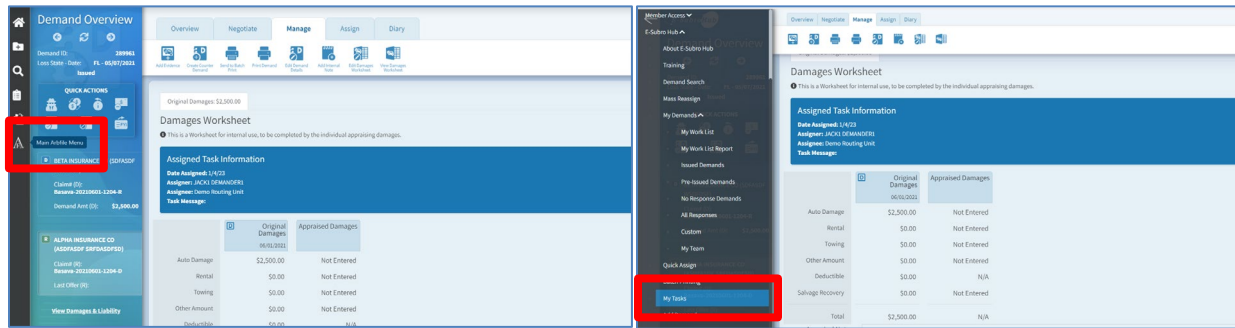
Add Evidence Task

The “Add Evidence” task can be flagged as “complete” by the clicking the “Task” column link to the evidence section of the demand’s “Overview” tab.

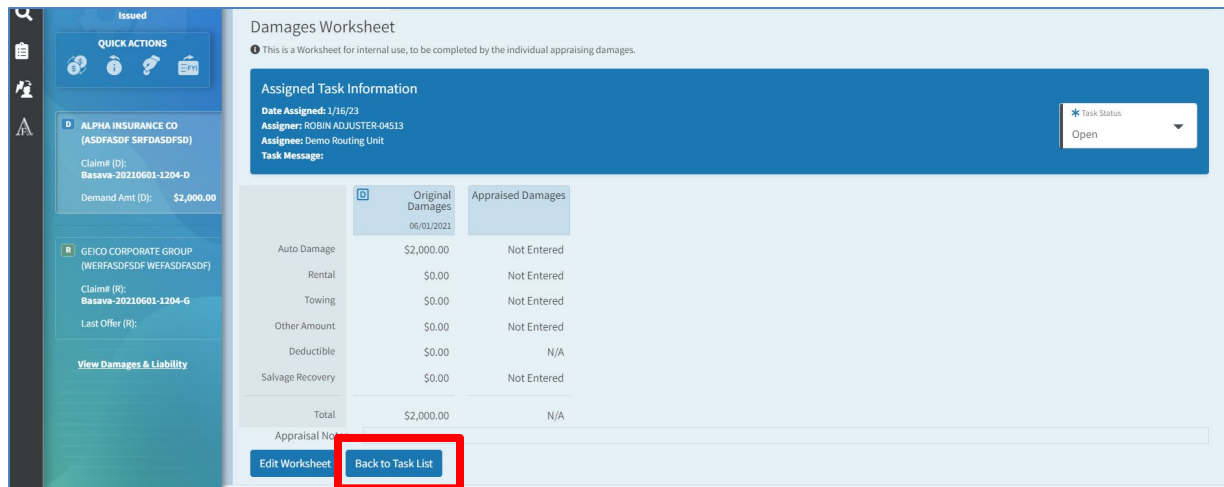


Return to Task List Page

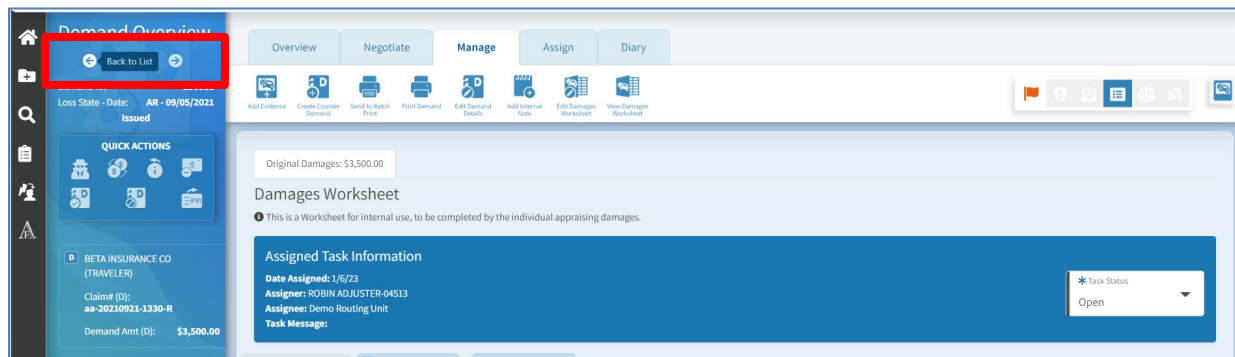
To return to the “Task List” page from a demand, click the AF logo on the left side of the page, then “My Tasks” on the menu.



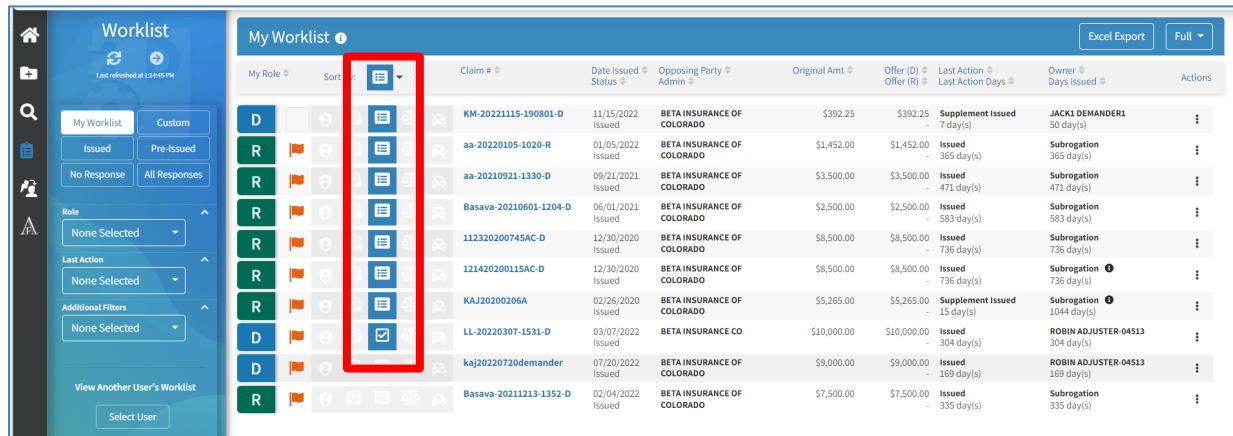
If visible, click “Back to Task List.”



Clicking the “Back to List” or the “Get Next Work” options from the demand will return the user to the primary “Work List” page, and not the “My Tasks” page.



My “Work List” page may display pending task assignments, but can include any other demands needing attention.



My Role	Sort	Claim #	Date Issued Status	Opposing Party Admin	Original Amt	Offer (D) Offer (R)	Last Action Last Action Days	Owner Days Issued	Actions
D		KM-20221115-190801-D	11/15/2022 Issued	BETA INSURANCE OF COLORADO	\$392.25	\$392.25 -	Supplement Issued - 7 day(s)	JACKI DEMANDER1 50 day(s)	⋮
R		aa-20220105-1020-R	01/05/2022 Issued	BETA INSURANCE OF COLORADO	\$1,452.00	\$1,452.00 -	Issued - 365 day(s)	Subrogation 365 day(s)	⋮
R		aa-20210921-1330-D	09/21/2021 Issued	BETA INSURANCE OF COLORADO	\$3,500.00	\$3,500.00 -	Issued - 471 day(s)	Subrogation 471 day(s)	⋮
R		Basava-20210601-1204-D	06/01/2021 Issued	BETA INSURANCE OF COLORADO	\$2,500.00	\$2,500.00 -	Issued - 583 day(s)	Subrogation 583 day(s)	⋮
R		112320200745AC-D	12/30/2020 Issued	BETA INSURANCE OF COLORADO	\$8,500.00	\$8,500.00 -	Issued - 736 day(s)	Subrogation 736 day(s)	⋮
R		121420200115AC-D	12/30/2020 Issued	BETA INSURANCE OF COLORADO	\$8,500.00	\$8,500.00 -	Issued - 736 day(s)	Subrogation 736 day(s)	⋮
R		KAJ20200206A	02/26/2020 Issued	BETA INSURANCE OF COLORADO	\$5,265.00	\$5,265.00 -	Supplement Issued - 15 day(s)	Subrogation 1044 day(s)	⋮
D		LL-20220307-1531-D	03/07/2022 Issued	BETA INSURANCE CO	\$10,000.00	\$10,000.00 -	Issued - 304 day(s)	ROBIN ADJUSTER-04513 304 day(s)	⋮
D		kaj20220720demander	07/20/2022 Issued	BETA INSURANCE OF COLORADO	\$9,000.00	\$9,000.00 -	Issued - 169 day(s)	ROBIN ADJUSTER-04513 169 day(s)	⋮
R		Basava-20211213-1352-D	02/04/2022 Issued	BETA INSURANCE OF COLORADO	\$7,500.00	\$7,500.00 -	Issued - 335 day(s)	Subrogation 335 day(s)	⋮