



# E-Subro Hub Help



Welcome to  
the Future of Subrogation

# **E-Subro Hub Help**

## **The Future of Subrogation**

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*by Arbitration Forums, Inc.*

*This manual represents a print version of the E-Subro Hub Online Help.*

*Care should be taken when referencing printed material as it may not represent the most up-to-date information available.*

# **E-Subro Hub Help**

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# 1 Introduction

This online help is designed to serve as a reference guide for E-Subro Hub.

## Topics in this section:

1. The [Overview](#) provides a high level view of E-Subro Hub.
2. [How E-Subro Hub Works](#) illustrates the application flow.
3. [About E-Subro Hub Help](#) provides additional information about this help system.

## 1.1 Overview



E-Subro Hub is an intelligent web based network used for subrogation demands between insurance carriers and other parties involved in subrogation.

### **E-Subro Hub Activities**

With E-Subro Hub, members can:

- Create and issue subrogation demands
- Attach supporting documents (estimates, bills, photos, police reports, etc.)
- Assign files to the appropriate owner
- Communicate and negotiate online
- Manage workload in one convenient dashboard
- Move the file to arbitration when appropriate (pertinent information will be pre-filled from the subrogation demand)

E-Subro Hub will:

- Validate demand information prior to issuance
- Automatically route issued demands based on rules set by the responding member company

#### **SEE ALSO:**

[How E-Subro Hub Works](#)  
[About E-Subro Hub Help](#)

## 1.2 How E-Subro Hub Works

E-Subro Hub gives subrogation parties full control of their demands. Here are the basic actions that can be performed via E-Subro Hub.

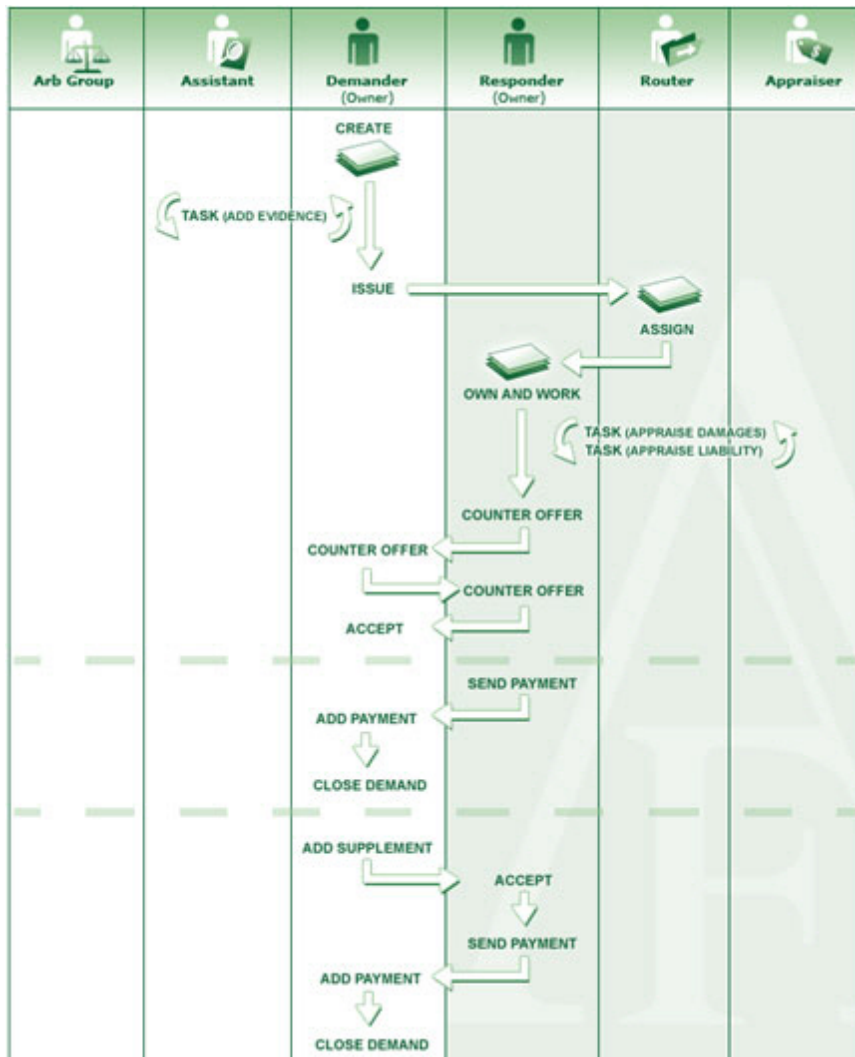
<i><b>Demander</b></i>	<i><b>Responder</b></i>
<ul style="list-style-type: none"> <li>• Create Demands</li> <li>• Assign Tasks (i.e. tasking an administrative assistant to add evidence)</li> <li>• Issue Demands</li> <li>• Negotiate</li> <li>• Add and Negotiate Supplements</li> <li>• Arbitrate</li> </ul>	<ul style="list-style-type: none"> <li>• Route Demands</li> <li>• Assign Tasks (i.e. damage and or liability worksheets)</li> <li>• Negotiate (i.e. accept Counter and Deny)</li> <li>• Respond to Supplements</li> </ul>

Below are two representative scenarios:

### **Scenario 1**

In the following scenario the Responder counter offers the Demander's demand, after brief negotiation the Demander accepts the Responder's offer. The Responder sends payment and the demand is closed. Later, a Supplement is added by the Demander. The Responder accepts the Supplement, sends payment and the Demander once again closes the demand.



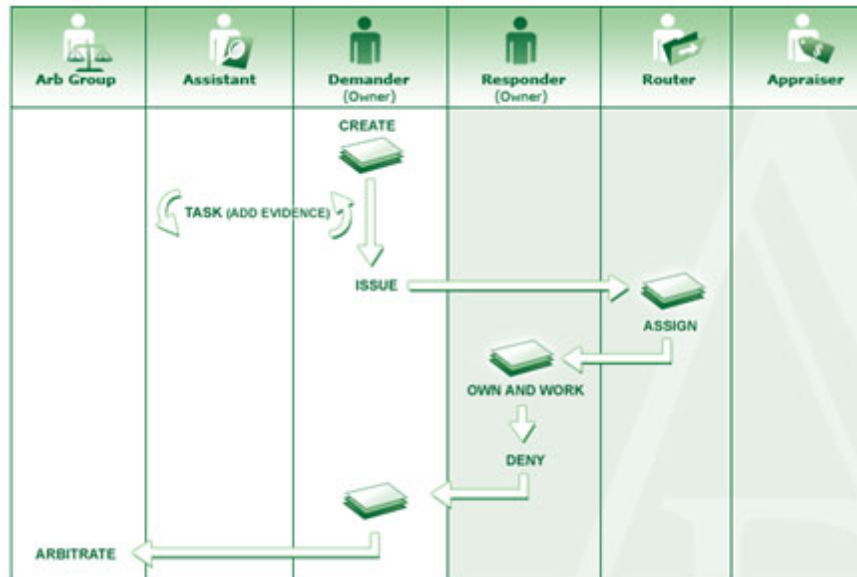


## Scenario 2

While many demands can be resolved via subrogation, arbitration is sometimes necessary. The following scenario explores what might happen when arbitration is needed. (Note: E-Subro Hub can be used to initiate an arbitration within Arbitration Forum's Online Filing.)

In the following scenario the Responder denies the Demander's demand.

The Demander decides to file arbitration and does so by simply clicking the Arbitration button within E-Subro Hub.

**SEE ALSO:**[Overview](#)[About E-Subro Hub Help](#)

## 1.3 About E-Subro Hub Help

Arbitration Forums (AF) developed this web-based user guide to help you become familiar with E-Subro Hub.

### Help Usage Tips

Here are some tips to help you use this web-based user guide. Use any of the methods below, depending on what works best for you.

- View the online user guide in sequence using the table of contents. Click the Contents button (upper left hand corner), then click on a book icon to see its contents. Click each page icon to view the corresponding information in the right-hand pane.
- Find information using the online index. Click the Index button, scroll through the keyword list, and then click the keyword. When you click a keyword, the corresponding topic appears in the right-hand pane.
- Locate every occurrence of a word or phrase in the online user guide by clicking the Search link and then entering the word. When the list of topics displays, click the topic title you want to display. The corresponding topic appears in the right-hand pane.
- Hyperlinks are clickable items such as text (typically underlined and displayed in a different color) that perform an action, such as displaying another topic or a Web page.

**SEE ALSO:**

[Overview](#)  
[How E-Subro Hub Works](#)

## 2 Getting Started

This section covers the basics of E-Subro Hub.

### Topics in this section:

1. [Accessing E-Subro Hub](#) covers user logins.
2. [User Profile](#) describes the information captured about a user.
3. [Common Conventions](#) details items that are commonly seen in E-Subro Hub.
4. [Notifications](#) discusses who receives notifications and why.

### 2.1 Accessing E-Subro Hub

There are three ways to access E-Subro Hub:

#### – Login User

A Login User is a user who has been given a specific User ID and Password.

Authentication is required to log in to the Arbitration Forums web site (of which E-Subro Hub is a part). A common way to authenticate is via the use a User ID and a Password.

Your Security Administrator controls the user names and passwords used by your company. See your supervisor if you have not been assigned a User ID and Password.

To Log In:

1. Start by clicking your company's internal link to the Arbitration Forums web site, or navigate to [www.arbfile.org](http://www.arbfile.org).
2. In the upper right hand corner, type your User ID and Password and click **Login**
3. Once you are logged on to the AF web site, use the **E-Subro** menu item to access subrogation functions.

#### – Auto-Login User

An Auto-Login user does not need a User ID or Password. In the case of an Auto-Login User, authentication occurs in the background (between the Customer Company and Arbitration Forums).

If your company uses Auto-Login, you will be provided a link which will take you directly into the AF web site.

Once you are logged on to the AF web site, use the **E-Subro** menu item to access subrogation functions.

**SEE ALSO:**[User Profile](#)[Common Conventions](#)[Notifications](#)

## 2.2 User Profile

Arbitration Forums, Inc. requires all users who access our web site (via Manual Login or Auto Login) to complete a user profile. This information helps the E-Subro Hub to pre-fill forms and to send notifications to you in a timely manner.

The first time you attempt to log in to the Arbitration Forums web site, you will be asked to complete a User Profile.

The red icon [  ] denotes required fields in the User Profile.

### – Company User ID Field

A Company User ID is the Internal ID by which you are known at your company. Having this internal ID stored in the AF web site will make it easier for people within your own company to find you when they need to assign a demand to you, or ask for your help with a task.

If your company doesn't assign user ID's, you'll still need to complete this field (since it a required field). Simply use your First name and Last name combined into a single word to form your own ID. (For example, johnsmith)

**Note:** The system will not allow duplicate Company ID's. If this ID is already in use by someone in your company, simply add a number to the end of the ID. (For example, johnsmith2)

### – How to Access the User Profile Form at a Later Date

If your contact information changes, you'll want to update your information on the AF web site. To do this, modify your User Profile.

To access the User Profile Form anytime after your first login, use the following steps:

1. Verify that you're logged in.
2. From the My Arbfile page, click **Member Access**.
3. Choose **Edit My Profile**.

**SEE ALSO:**[Accessing E-Subro Hub](#)[Common Conventions](#)[Notifications](#)

## 2.3 Navigating E-Subro Hub

When you first enter E-Subro Hub, the action menu and various buttons and page tabs will be present on the screen. Each page has its own set of unique buttons and drop-down menus. Take a moment to familiarize yourself with the work environment.

### Help Button

If you are unsure about an operation or how to perform a task look for the blue Help icon.

This indicates there is context sensitive help for the page you are working on.

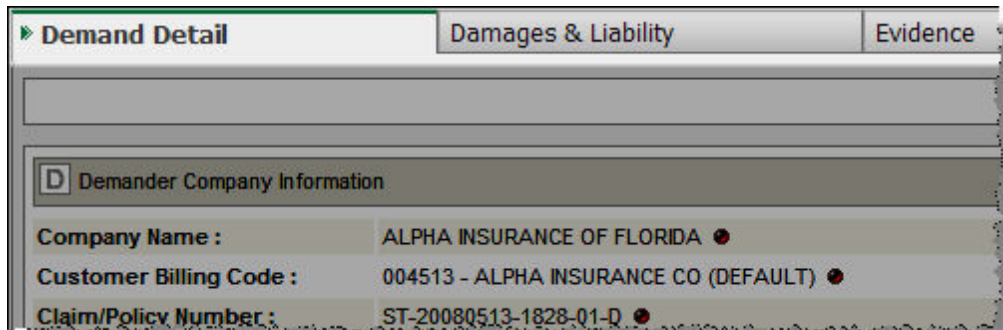
Clicking the Help icon will launch the associated Help page.



*Help Button*

### Page Tabs

Under the Action menu you will see page tabs, each of these tabs represents a different transaction screen. Clicking on these tabs will take you to the corresponding screen.



*Page Tab Example*

### Buttons

Use buttons on specific pages to perform the action state on the button.



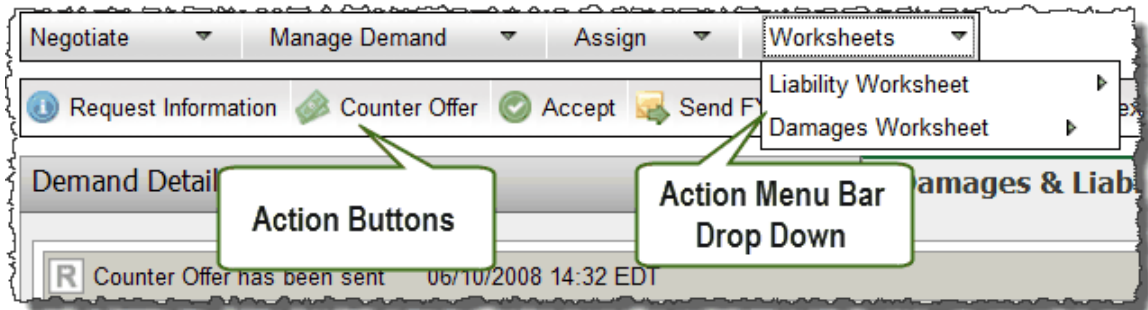
*Example of Typical Buttons*

### Action Menu Bar/Buttons Navigation

The "▼" icon next to an Action Menu Bar item represents a drop-down menu that will appear when


you click once. After the drop-down menu appears, move your mouse down and to the option you wish to select, and click.

Common actions can be accessed via the Action Buttons located below the menu. The available buttons will change based on the current state of the demand.



### Required vs. Requested

When creating a demand certain fields will be required or requested as shown below.

Required  Requested   
*Required and Requested  
 Fields*

**Required Fields:** Fields with this symbol must be completed prior to issuing the demand.

**Requested Fields:** While optional, fields with this symbol have been requested to be completed by either your own company or the opposing company.

### Collapsed/Expanded Panes

Panes with an up or down arrow (as shown below) can be expanded or collapsed.

	Negotiated Liability %	Total Demand
\$11,000.00		
\$500.00		
\$0.00		
\$200.00		
\$1,000.00		
(\$0.00)		
\$12,700.00	Responder Liability %	\$12,700.00
supplement to estimate of 1,000.00		
Supplement Damages: \$1,000.00		
Supplement Damages: \$0.00		
Original Damages: \$11,700.00	Negotiated Damages: \$11,700.00	Liability %: 100 Total Demand: \$11,700.00
Original Damages: \$11,500.00	Negotiated Damages: \$11,500.00	Liability %: 100 Total Demand: \$11,500.00

Expand/Collapse Panes

**SEE ALSO:**

[Accessing E-Subro Hub User Profile Notifications](#)

## 2.4 Notifications

E-Subro Hub has the ability to notify a designated party when an event occurs that requires attention.

### — What are Notifications

Notification preferences are configurable by your company's E-Subro Hub administrator. The administrator will have the ability to set whether notifications should occur, and how they should be delivered for high priority actions versus low priority actions.

Notifications can be sent as individual events or as a daily or weekly digest of events. The method of delivery for notifications is email.

Administrators see [E-Subro Preferences](#) for additional information on this topic.

### — Who will be Notified

Notifications are based on the priority of the event that occurs. For instance, when a demand is issued, a notification will be sent to the individual or team on file to receive these notices within the

Responder company.

**Note:** This notification is dependent upon the notification preferences as setup by the Responder Company.

### – What to do if I'm Notified

When you've been notified, via email, you'll find a link that you can click or type into your internet browser to access the demand. You may want to access the Demand and respond to it.

For instance, if you are the Demander, and you have been notified that the Responder has issued a counter offer, you will likely want to review that counter offer and decide whether to accept it or to negotiate further.

### – High Priority Notifications

The following actions will trigger high priority notifications.

- Demand Issued
- Demand Re-issued
- Counter Offer Issued
- Demand Accepted
- Demand Denied
- Ownership Assigned
- Ownership Accepted
- Task Assigned
- Task Completed
- Supplement Issued
- Original Damages Edited
- Request for Information
- Request for Information Completed

### – Low Priority Notifications

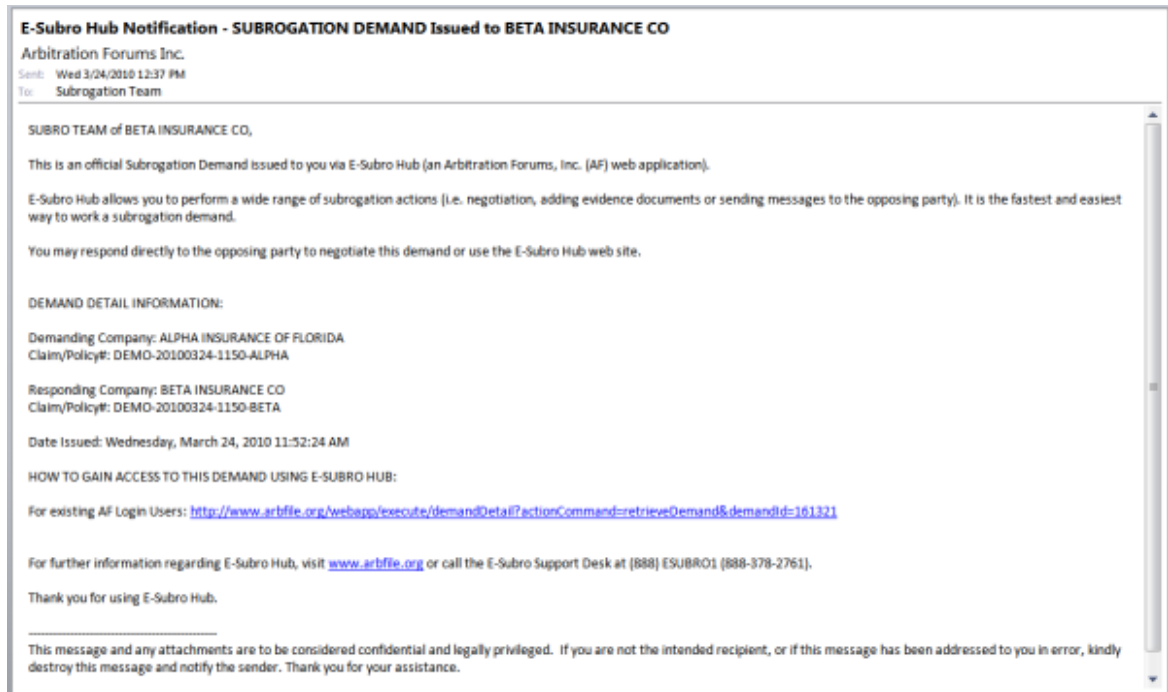
The following actions will trigger low priority notifications.

- Message Added
- Demand Details Edited
- Demand Closed
- FNOL (First Notice Of Loss) by Responder
- Investigating by Responder
- Evidence Added
- Evidence Modified
- Evidence Flagged Obsolete
- Arbitration Initiated
- Arbitration Filed
- Demand Re-opened



- Demand Manually Settled by Demander
- Internal Note Added

### — An Example of an E-Subro Hub Notification



Sample E-Subro Hub Notification

#### SEE ALSO:

[Accessing E-Subro Hub](#)  
[User Profile](#)  
[Common Conventions](#)

## 3 Finding a Demand

Finding demands is an important skill within E-Subro Hub. Luckily, we've made it easy!

### Topics in this section:

1. [Work Lists](#) details the most common way that a user interacts with the system.
2. [Search for a Demand](#) covers the easiest method for locating a specific demand.

## 3.1 Demand Lists

Demand Lists function as the basic list format that users work from on a daily basis. E-Subro Hub provides several predefined lists as well as the ability to customize existing lists or build completely custom lists.

### – Demand Lists

Demand Lists are presented as a list of demands with certain attributes displayed in columnar format. Depending on the specific list, some columns are not present on all lists.

My Role	Oposing Party	Claim Number	Date Issued	Demand Amt	Response Amt	Status	Last Action	Last Action Date	Owner	Actions
R	ALPHA INSURANCE OF FLORIDA	<a href="#">PJ-20070112-1055R</a>	01/12/2007	\$3,800.00		Issued	Issued	01/12/2007	Arbitration	
R	ALPHA INSURANCE OF FLORIDA	<a href="#">PJ-20070115-1003R</a>	01/15/2007	\$4,894.00		Issued	Issued	01/15/2007	Arbitration	
R	ALPHA	<a href="#">PJ-20070115-1500R</a>	01/15/2007	\$3,800.00		Issued	Issued	01/15/2007	Arbitration	

The most frequently used demand list is [My Work List](#). This list is where the majority of a users work in the system begins.

For more specific information about work lists, see [Demand Lists](#).

#### SEE ALSO:

[My Work List](#)

[Preset Demand Lists](#)

[Custom Demand Lists](#)

[Demand List Icons](#)

[The Diary Feature](#)

## 3.2 Search for a Demand

When you know the claim number for the demand you're looking for, its easy to use the Demand Search feature to find the demand.

### – Search for a Demand

To initiate a search:

1. Click the **Demand Search** option from the E-Subro Menu.

You are taken to the Case Lookup screen where you can search for E-Subro Hub demands as well as Online Filing and E-Speed cases. Note that the middle tab (Search By File Number) is automatically opened. Use this tab to search for an E-Subro Hub demand.

2. Type (or paste) your claim number into the Claim / File Number field and click the **Search** button.

When the results return, be certain to check if there is more than one tab which contains results. If more than one results tab exists, the E-Subro Hub results may not have the initial focus. If this is the case, simply click the appropriate tab to view the desired results.

**Note: There may be more than one results tab.**

Search By AF ID Search By File Number Search By Insured Info

Claim / File Number: CP20081209

Search

Docket Records - 3 Subro Records - 1

Last Search: File Number is like CP20081209.  
3 Dockets found, displaying all Dockets.

Docket Number	Status	Loss State	Hearing	Company Name
<a href="#">A025004690800</a>	OPEN	Florida	Feb 02, 2009	BETA INSURANCE

Search Results are tabbed

3. Once you see the desired results, simply click the **Claim Number** link to open the desired demand.

If the list of demands is too long to find your demand, try typing more of the claim number in the search criteria before clicking the Search button.

If the list of demands does not include a matching demand, ensure the number was entered correctly or reduce the length of the claim number by a few characters and search again.

If you still can't find your demand, it may be that it is not yet in E-Subro Hub. You can use the [Custom Demand List](#) features to see a list of all demands your company has in E-Subro Hub, if you want a final check.

**SEE ALSO:**

[Work Lists](#)

[Preset Demand Lists](#)

[Custom Demand Lists](#)

[Demand List Icons](#)

[The Diary Feature](#)

## 4 Demand Lists

Demand Lists provide lists of demands.

### Topics in this section:

1. [My Work List](#) shows demands that need attention.
2. [Team Management](#) provides a filtered list of the demands for a team.
3. [Other Preset Demand Lists](#) describes all of the Demand Lists that have preset criteria.
4. [Filtering Demand Lists](#) details how to use filters to see the specific demands you want to see.
5. [Demand List Icons](#) illustrates the icons found in the Demand Lists.
6. [The Diary Feature](#) covers information needed to use diaries within E-Subro Hub.

### 4.1 My Work List

**My Work List** is a preset demand list that offers the best way to see demands that need your attention. Use My Work List as your daily management screen for demands within E-Subro Hub.

As you complete work, your demand's action flags will be moved to the other party and the demands will no longer be displayed on your list.

My Work List was designed to be worked to completion (all demands cleared from the list) on a daily basis.

This page has an automatic Refresh feature that will allow the user to stay logged in during the day without being logged off. The page can be refreshed manually by clicking the Refresh command.

In some circumstances, you may not be able to work a given demand (i.e. You are waiting for information). Use the [Diary feature](#) to remove the demand from My Work List for a specific period of time. When the diary expires, the demand will appear on the Work List of the current demand owner.

#### Accessing My Work List

The Work List is accessed via the top level AF menu: E-Subro > My Demands > My Work List.

### – Current List Drop Down Menu

The Current List drop down menu provides easy access to the existing [preset demand lists](#).

Click the drop down menu and select the desired demand list to change the current list.

### – Get Next Work Button

The Get Next Work button provides an easy method for either individual users or teams to obtain the next available demand from [My Work List](#) without the concern of choosing a demand that someone else is already working. The Get Next Work button is one of the components that makes the concept of team handling possible, but is also an effective way for individual users to progress through their respective Work Lists.

The **Get Next Work** button appears both on My Work List and within the demand.

Click the **Get Next Work** button to access the next available demand upon completion of your current work.

**Note:** If you view a demand without making the changes that would remove it from My Work List, it will remain as the next available demand on the list.

### – Show Statistics Button

Click the **Show Statistics** link to open the Demand Filter Statistics pop-up.

This will show:

- **Sum:** A sum of the Total Demand and Total Response amounts for the demands that currently appear in your filtered list.
- **Count:** A count of the demands that have a Total Demand or Total Response amount. (all demands must have a total demand amount. Not all will have a total response amount).
- **Average:** The average Demand or Response amount for each demand that includes one of those values. (Note: This average is the Sum divided by the Count)

**Note:** When you change the list page filters to include or exclude some of the demands, the Statistics pop-up will reflect those filter changes.

### – Role Filter Drop Down

Choose the Role filter to access an easy method with which to view only specific demands:

- **Responder:** Displays only those demands where you are the Responder.
- **Demander:** Displays only those demands where you are the Demander.

- **Both:** Displays all demands (this is the default for this filter).

### — Last Action Filter Drop Down

Choose the Last Action filter to access an easy method with which to view only specific demands:

- **Ignore:** Displays demands regardless of the last action.
- **Accepted:** Displays only those demands where you or the other party accepted the most recent offer.
- **Countered:** Displays only those demands where you or the other party sent a counter offer.
- **Denied:** Displays only those demands where you or the other party denied the most recent offer.
- **Edited Damages:** Displays only those demands where the Demander edited the original damages.
- **FNOL:** Displays only those demands where the Responder identified it as a first notice of loss.
- **Investigation:** Displays only those demands where the Responder is investigating the claim.
- **Issued:** Displays only those demands you or the other party issued.
- **Reopened:** Displays only those demands reopened by the Demander.
- **Request Information:** Displays only those demands where you or the other party requested information.
- **Reply to a Request:** Displays only those demands where you or the other party replied to a request or followed up on a request.
- **Demander Manual Settlement:** Displays only those demands marked as settled by the Demander because an agreement was reached outside of E-Subro Hub.
- **Supplement Issued:** Displays only those demands where the Demander issued a supplement.

### — Additional Filters

Choose the Additional filter to access an easy method with which to view only specific demands:

- **Ignore:** Displays demands regardless of the last action.
- **Show Only Supplements for Resolved Demands:** Displays only those resolved

demands that have received supplements.

- **Exclude Pre-Issued Demands:** Excludes demands that are created but not yet issued.

### — Export Option

You can export the results of a list to an Excel spreadsheet. This renders an excellent overview of the search results and provides a significantly faster method of searching large numbers of pages.

**Work List: Demands on this list**  
2,907 Demands found, displaying

[First/Prev] [1](#), [2](#), [3](#), [4](#), [5](#), [6](#), [7](#), [8](#)

Export options: [Excel](#) | [PDF](#)

Click the Excel link and you will be asked if you would like to open or save the document. Your document will open with the results in them.

### — Reasons that Demands appear on My Work List

E-Subro Hub knows who you are based on your login and My Work List will only show demands specific to you or the team(s) to which you are assigned.

Demands appear in My Work List if:

1. You or one of your assigned Business Units (teams) are the Owner of the demand.

AND


You have the Action Flag () or the Message Flag (.

OR

2. You are the Assigned Owner (assignee) of the demand.

**Note:** In this case, someone assigned the demand to you and you have not yet taken ownership. The two-step reassignment process is by company configuration and is generally a rare workflow.

OR

3. You, or one of your assigned Business Units (teams), are the Task Assignee () for an outstanding task on this demand.

**Note:** An outstanding task on this demand has been assigned to you to be completed.

Occasionally you may need to reopen a demand and E-Subro Hub makes that easy.

**SEE ALSO:**

[Counter Offer](#)  
[Accept](#)  
[Edit Original Damages](#)  
[Supplement](#)  
[Arbitrate](#)

**SEE ALSO:**

[Search for a Demand](#)  
[Other Preset Demand Lists](#)  
[Custom Demand Lists](#)  
[Demand List Icons](#)  
[The Diary Feature](#)

## 4.2 Team Management

Supervisors may use Team Management functionality to identify users that they manage and view a filtered list of E-Subro Hub demands for their entire team.

My Team is accessed via the top level AF menu: E-Subro > My Demands > My Team. This functionality is available only after "Team management feature" is set to "Enable teams" on the E-Subro Hub Configuration tab: Administration>Company Preferences>E-Subro Hub Preferences.

To edit your team, click the **Edit My Team** button. If no team exists for you, choosing the "My Team" option will automatically open the Edit My Team page.

- **Add a Team Member:** Use this selection if you are adding members to your team, one by one. Enter one or more of the following: First Name, Last Name, City, State, Company User ID, or Email address. Click "Search". If more filtering information is entered, the search results will be smaller. Click the plus sign in the green circle, the Add icon, to add the individual.
- **Add Members from an Existing Team:** Enter at least 3 characters of a current Team Leader's name. If a person does not have a team, you will not see that person in the results. Matching selections will appear in a drop menu. Choose the correct Team Leader. Select the team member to be added to your team. If the entire team is to be added, select "Add All".
- **Remove Members from Your Team:** To remove individual team members, click the minus sign in the red circle, the Remove icon, to the left of their Company User ID. To remove all your team members, click "Remove All" at the top of the column of Remove icons.

## 4.3 Other Preset Demand Lists

E-Subro Hub provides a number of Preset Demand Lists to help you view the demands using different pre-built filters. [My Work List](#) is considered the primary Preset Demand List and this topic discusses the remainder of the preset lists.



If you need more flexibility and advanced features when viewing your Demand Lists, visit [Custom Demand Lists](#).

## – How to Access Preset Demand Lists

### From the AF Main Menu

From the AF top level menu, choose the E-Subro menu option and find preset demand lists under the My Demands option.

### From within a Demand List

Once you are viewing a Demand List, you can change between preset lists using the Current List drop-down menu.

## – Preset Demand Lists

The following preset demand lists are available:

- **Issued Demands:** Shows demands from the perspective of the demanding company (the company who created and/or issued the demand). By default, shows outstanding demands that are owned by you or your Team (Business Unit) and have been issued within the last 8 weeks. You can customize this list by clicking the "Show Filter Details" button, and modifying the filter choices to suit your needs. See [Custom Demand Lists](#) for more information.
- **Pre-Issued Demands:** Shows demands that are created but not yet issued. You can customize this list by clicking the "Show Filter Details" button, and modifying the filter choices to suit your needs. See [Custom Demand Lists](#) for more information.
- **No Response Demands:** Shows demands that have not been responded to in 15+ days. By default, demands are shown from the perspective of the demander. This can be changed to show no response demands from the responder perspective (using the "Role" filter). You can customize this list by clicking the "Show Filter Details" button, and modifying the filter choices to suit your needs. See [Custom Demand Lists](#) for more information.
- **All Responses:** Shows demands from the perspective of the responding company. You can customize this list by clicking the "Show Filter Details" button, and modifying the filter choices to suit your needs. See [Custom Demand Lists](#) for more information.
- **Other User's Work List:** Shows demands from the perspective of another user's My Work List and can be accessed only from the Current List dropdown menu. After selecting the user whose list you would like to view, you will be able to view and work from that list without taking ownership of the individual demands.

## – Show Statistics Button

Click the **Show Statistics** link to open the Demand Filter Statistics pop-up.

This will show:

- **Sum:** A sum of the Total Demand and Total Response amounts for the demands that currently appear in your filtered list.
- **Count:** A count of the demands that have a Total Demand or Total Response amount. (all demands must have a total demand amount. Not all will have a total response amount).
- **Average:** The average Demand or Response amount for each demand that includes one of those values. (Note: This average is the Sum divided by the Count)

**Note:** When you change the list page filters to include or exclude some of the demands, the Statistics pop-up will reflect those filter changes.

**SEE ALSO:**

[My Work List](#)

[Custom Demand Lists](#)

[Demand List Icons](#)

[The Diary Feature](#)

[Search for a Demand](#)

## 4.4 Custom Demand Lists

Custom Demand Lists provide a way to create filters based on your criteria. They are considered an advanced feature of E-Subro Hub and should only be used if you have a good understanding of filtering.

### – Accessing Custom Filters

To Customize a Demand List page, you'll need access to the Filters. Do this from any Demand List by choosing **Custom** from the Current List drop down.

Another way to access the Custom Filters is to click the **Show Filter Details** button. This button is available from many of the Preset Demand Lists.

**Note:** The Show Filter Details button is NOT AVAILABLE from My Work List. This is due to the fact that My Work List needs to make certain assumptions in order to show you the proper demands that need your attention.

### – Using Custom Filters

Once you've accessed the custom filters, you'll see them at the top of the Demand List page.

Custom Filter Field Definitions:

<b>Field Name</b>	<b>Description</b>
Role	Use the Role filter to choose whether you'd

	like to see demands from the Demander or Responder perspective.
Owner	The Owner filter lets you choose demands based on who the demand is assigned to.
Company	<p>The Company filter lets you type an opposing company name (or partial name) with which to filter the list.</p> <p><b>Note:</b> Typing only an “f” will not only return companies that start with “f” (ie. Fairlane Insurance, Inc.), but also any companies that have an “f” anywhere in their name (ie. Second Frontier Insurance, Inc.). For this reason, it is best to use a two or more character sequence to narrow your search.</p>
Action Flag	Choosing Yes on this filter will display those demands which have an Action Flag. Choosing No will display those demands which do not have an Action Flag.
Message Flag	Choosing Yes on this filter will display those demands which have a Message Flag. Choosing No will display those demands which do not have a Message Flag.
Demand Amount	<p>Returns demands based on the demand amount. The choices are all pre-set. Your choices are:</p> <ul style="list-style-type: none"> <li>• Ignore – ignores this filter</li> <li>• &gt;=\$1000 – returns demands with demand amounts greater than or equal to \$1000.00.</li> <li>• &gt;=\$5000 – returns demands with demand amounts greater than or equal to \$5000.00.</li> <li>• &gt;=\$10000 – returns demands with demand amounts greater than or equal to \$10000.00.</li> </ul>

	<ul style="list-style-type: none"> <li>• &gt;=\$20000 – returns demands with demand amounts greater than or equal to \$20000.00.</li> </ul>
Demand Status	<p>Returns demands that currently have the status that you've chosen. Your choices are:</p> <ul style="list-style-type: none"> <li>• Pre-Issued – returns demands that have not yet been issued</li> <li>• Outstanding – returns demands from the following statuses: <ul style="list-style-type: none"> <li>○ Issued – returns demands only with the Issued status.</li> <li>○ In Negotiation – returns demands in the In Negotiation status.</li> <li>○ Accepted – returns demands in the Accepted status.</li> <li>○ Pending – returns demands in the Pending status. Pending status is initiated when the responder chooses the FNOL or Investigating actions.</li> <li>○ Denied – returns demands in the Denied status.</li> <li>○ Settled – returns demands in the Settled status.</li> </ul> </li> <li>• Closed – returns demands in the Closed status.</li> </ul> <p><b>Note:</b> A Demand Status is transitory. If the last action on a demand was an acceptance, the demand will be in the Accepted status. However, if the Demander subsequently closes the demand, the status will change to Closed. The Status filter only filters demands based on their CURRENT status. It will not find demands that have previously been in that status.</p>
Issue Date	The Issue Date filter lets you specify the date

	<p>range for which you'd like to see demands. You may choose one of the following:</p> <ul style="list-style-type: none"> <li>• Last 4 weeks – returns the demands Issued within the last 4 weeks.</li> <li>• Last 8 weeks – returns the demands Issued within the last 8 weeks.</li> <li>• Specify Date Range – allows you to specify a 90 day range. Returns only demands that have been Issued during the range of time you specify. Click the From and To buttons to easily select a date from the calendar pop-up. Remember that you need to click the Retrieve Demands button in order to begin your search.</li> </ul>
No Response In	<p>Returns demands that have not been responded within a certain amount of time. Your choices are:</p> <ul style="list-style-type: none"> <li>• +15 days – returns No Response demands that are at least 15 days old</li> <li>• +30 days - returns No Response demands that are at least 30 days old</li> <li>• +60 days - returns No Response demands that are at least 60 days old</li> </ul>
Inactive For	<p>Returns demands for which no action has occurred within a certain amount of time. Your choices are:</p> <ul style="list-style-type: none"> <li>• +15 days – returns demands that have been Inactive for at least 15 days</li> <li>• +30 days – returns demands that have been Inactive for at least 30 days</li> <li>• +60 days – returns demands that have been Inactive for at least 60 days</li> </ul>

**– Show Statistics Button**

Click the **Show Statistics** link to open the Demand Filter Statistics pop-up.

This will show:

- **Sum:** A sum of the Total Demand and Total Response amounts for the demands that currently appear in your filtered list.
- **Count:** A count of the demands that have a Total Demand or Total Response amount. (all demands must have a total demand amount. Not all will have a total response amount).
- **Average:** The average Demand or Response amount for each demand that includes one of those values. (Note: This average is the Sum divided by the Count)

**Note:** When you change the list page filters to include or exclude some of the demands, the Statistics pop-up will reflect those filter changes.

**SEE ALSO:**

[My Work List](#)

[Other Preset Demand Lists](#)

[Demand List Icons](#)

[The Diary Feature](#)

[Search for a Demand](#)

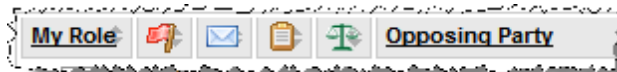
## 4.5 Demand List Icons

When looking at the Demand List, you'll note the use of certain icons to convey information. This topic details the icons you'll find and where.


### Where do icons appear on Demand Lists

Some of the columns on the left hand side of the Work List show icons that describe the status of the demand.


These column headers look like this:









*Column Header Icons*

The Actions column contains the  icon, which is used to see the actions that can be performed on a Demand directly from the Demand List.

### Icons that Appear on Demand Lists

 Action Flag	Based on the actions that have occurred on the demand, it is now
---	--

	<p>your turn to do something.</p> <p>Click the Action Flag to see information regarding the Action Flag.</p>
 Diary Flag	<p>When the flag is grey, it represents an 'active' diary on the demand.</p> <p>Click the Diary Flag to see information regarding the active diary.</p>
 Message Flag	<p>An unread message is waiting for you on this demand.</p> <p>Click the Message Flag to see the waiting message. Use the Clear Message Flag link to remove the message flag.</p>
<p>Task Indicator</p> 	<p>One or more unfinished tasks exist on this demand.</p> <p>Click the Task Indicator to see the waiting message.</p> <p><b>Note:</b> You'll get the same effect by clicking a Task Indicator that shows complete (the green checkmark). However, you'll note that the status for all tasks will be COMPLETE.</p>
 Task Complete Indicator	<p>Indicates that all tasks on a demand are complete.</p>
 Arbitration Flag	<p>When the Arbitration flag is present, the demand has been sent to arbitration.</p> <p>Click the Arbitration Flag to see information regarding the existing arbitration case.</p>
 Actions Icons	<p>Click this icon to see a menu of actions that are available to be performed on a Demand directly from the Demand List.</p>

**SEE ALSO:**[Work Lists](#)[Preset Demand Lists](#)[Custom Demand Lists](#)[The Diary Feature](#)[Search for a Demand](#)

## 4.6 The Diary Feature


The Diary is used to suppress an Action Flag in an attempt to remove the demand from [My Work List](#) for a specified period of time.

Diaries are associated with a specific demand rather than a specific user. This means that any diaries which are set for a given demand will stay with that demand even if the ownership changes.


**Note:** This will remove it from [My Work List](#) as long as no other factors exist that would keep it on the list. These factors include: (a) A Message Flag is present or, (b) You have an unfinished task assigned to you.

### – Set Diary

The Set Diary action can be invoked:

1. From any Demand List by clicking the  icon and then choosing the **Set Diary** link.
2. From an Action Flag on the Demand List or within the demand.


Once you've chosen the Set Diary action and the Set Diary popup appears:

1. Enter the number of days before the Diary expires in the Expires In column.  
  
OR
2. Enter the date you wish the Diary to expire by selecting it from the Calendar ().
3. Add a comment that will remind you why a diary was set. (The more specific you are here, the less time you'll spend trying to figure out what your next step is when the Diary expires and the demand returns to My Work List).
4. Click the **Set Diary** button to complete the action

A grey flag will appear in the demand, representing the Diary.


### – Set a New Diary

When you want to remove an existing diary and create a new one immediately, use the Set New Diary feature to do it all in one action.

The Set New Diary action can be invoked from within an Action Flag on the Demand List or a Demand by clicking the Diary Flag  and then choosing the Set New Diary link or from the **Manage Demand** menu → **Set New Diary**. This can be done for an active diary or an expired diary.

### – Cancel Diary


When you want to remove an existing diary, use the Cancel Diary feature.

The Cancel Diary action can be invoked from within an Action Flag on the Demand List or a Demand by clicking the Diary Flag  and then choosing the Cancel Diary link or from the **Manage Demand** menu → **Cancel Diary**..



## – Dismiss Expired Diary

When a diary has expired, it will either "unsuppress" the Action Flag or create a new Action Flag that exists only because the diary expired. Either way a red Action Flag will remain on your demand. If you want to remove the demand from your Work List, and the Action Flag only exists due to the expired diary, use the Dismiss Expired Diary link to accomplish your goal.

The Dismiss Expired Diary action can be invoked from the Demand List or within a Demand by clicking the Action Flag  and then choosing the Dismiss Expired Diary link.

## – Automatic Diaries

Automatic Diaries are diaries that get set automatically when a certain event occurs in E-Subro Hub. Currently, there are two events which trigger Automatic Diaries.

1. **Issue Demand:** When a demand is Issued, an Automatic Diary is created on the demand. The number of days is set by Company configuration. The diary is associated with the demand for which it is created and will move with the demand if the demand is assigned to another user.
2. **Acceptance:** When a demand is accepted (by the Demander or the Responder) an Automatic Diary is created for the Demander. The number of days is set by Company configuration. This removes the demand from the Demander's My Work List while awaiting payment, unless "Auto Close" is configured, but also prevents the demand from being forgotten.

### SEE ALSO:

[My Work List](#)

[Other Preset Demand Lists](#)

[Custom Demand Lists](#)

[Demand List Icons](#)

[Search for a Demand](#)

## 5 Demand Actions

This section covers the actions which can be performed on a demand.

### Topics in this section:

<i><b>Demander Actions</b></i>	<i><b>Responder Actions</b></i>
1. Add Demand <ul style="list-style-type: none"> <li>• <a href="#">Demand Creation</a></li> <li>• <a href="#">Demand Detail Tab Add</a></li> <li>• <a href="#">Damages &amp; Liability Tab Add</a></li> <li>• <a href="#">Evidence Tab Add</a></li> <li>• <a href="#">Demand Summary Tab</a></li> </ul>	1. EENegotiate Actions <ul style="list-style-type: none"> <li>• <a href="#">Counter Offer</a></li> <li>• <a href="#">Accept</a></li> <li>• <a href="#">Deny</a></li> </ul> 2. Managing Tasks <ul style="list-style-type: none"> <li>• <a href="#">Task Assigner</a></li> </ul>

<ul style="list-style-type: none"> <li>• <a href="#">Validations and Related Cases</a></li> </ul> <ol style="list-style-type: none"> <li>2. Managing Tasks <ul style="list-style-type: none"> <li>• <a href="#">Task Assigner</a></li> <li>• <a href="#">Task Assignee</a></li> </ul> </li> <li>3. Assignment <ul style="list-style-type: none"> <li>• <a href="#">Assign Demand to User</a></li> <li>• <a href="#">Assign Demand to Business Unit</a></li> <li>• <a href="#">Assign Task to User</a></li> <li>• <a href="#">Assign Task to Business Unit</a></li> <li>• <a href="#">Take Ownership</a></li> </ul> </li> <li>4. Negotiate Actions <ul style="list-style-type: none"> <li>• <a href="#">Counter Offer</a></li> <li>• <a href="#">Accept</a></li> <li>• <a href="#">Reopen</a></li> <li>• <a href="#">Arbitrate</a></li> </ul> </li> <li>5. Manage Demand <ul style="list-style-type: none"> <li>• <a href="#">Edit Original Damages</a></li> <li>• <a href="#">Edit Demand Detail</a></li> <li>• <a href="#">Add Evidence</a></li> <li>• <a href="#">Add Internal Note</a></li> <li>• <a href="#">Send FYI</a></li> <li>• <a href="#">Set New Diary</a></li> <li>• <a href="#">Create Companion Demand</a></li> <li>• <a href="#">Supplement</a></li> <li>• <a href="#">Add Payment</a></li> <li>• <a href="#">View Payment History</a></li> <li>• <a href="#">Manual Settlement Override</a></li> <li>• <a href="#">Close Demand</a></li> <li>• <a href="#">Print Demand</a></li> <li>• <a href="#">Send to Batch Print</a></li> </ul> </li> </ol>	<ul style="list-style-type: none"> <li>• <a href="#">Task Assignee</a></li> </ul> <ol style="list-style-type: none"> <li>3. Assignment <ul style="list-style-type: none"> <li>• <a href="#">Assign Demand to User</a></li> <li>• <a href="#">Assign Demand to Business Unit</a></li> <li>• <a href="#">Assign Task to User</a></li> <li>• <a href="#">Assign Task to Business Unit</a></li> <li>• <a href="#">Take Ownership</a></li> </ul> </li> <li>4. Manage Demand <ul style="list-style-type: none"> <li>• <a href="#">Add Evidence</a></li> <li>• <a href="#">Add Message</a></li> <li>• <a href="#">Edit Demand Detail</a></li> <li>• <a href="#">Edit Damages Worksheet</a></li> <li>• <a href="#">Edit Liability Worksheet</a></li> <li>• <a href="#">FNOL (First Notice of Loss)</a></li> <li>• <a href="#">Investigating</a></li> <li>• <a href="#">Print Demand</a></li> <li>• <a href="#">Close Demand</a></li> <li>• <a href="#">Counter Demand</a></li> </ul> </li> </ol>

## 5.1 Demander Actions

This section covers the actions most often used by the demander.

### Topics in this section:

1. Add Demand
  - [Demand Creation](#)
  - [Demand Detail Tab Add](#)
  - [Damages & Liability Tab Add](#)
  - [Evidence Tab Add](#)
  - [Demand Summary Tab](#)
  - [Validations and Related Cases](#)
2. Assignment
  - [Assign Demand to User](#)
  - [Assign Demand to Business Unit](#)
  - [Assign Task to User](#)
  - [Assign Task to Business Unit](#)
  - [Take Ownership](#)
3. Negotiate Actions
  - [FNOL \(First Notice Of Loss\)Of Loss\)L](#)
  - [Investigating](#)
  - [Request Information](#)
  - [Reply to a Request](#)
  - [Counter Offer](#)
  - [Accept](#)
  - [Deny](#)
  - [Reopen](#)
  - [Arbitrate](#)
  - [Acknowledge Demander Acceptance](#)
4. Managing Tasks
  - [Task Assigner](#)
  - [Task Assignee](#)
5. Manage Demand
  - [Edit Original Damages](#)
  - [Edit Demand Detail](#)
  - [Add Evidence](#)
  - [Add Internal Note](#)
  - [Send FYI](#)
  - [Diaries](#)
  - [Create Companion Demand](#)
  - [Supplement](#)
  - [Payment](#)
  - [Manual Settlement Override](#)
  - [Close Demand](#)
  - [Print Demand](#)
  - [Send to Batch Print](#)

### 5.1.1 Demand Creation

Demands must be manually entered into the E-Subro Hub by the demanding party.

In order to be able to add demands, your company needs to be setup as an active E-Subro Hub company.

If you do not see the Add Demand menu item, you need to check the following:

1. Ask your E-Subro Hub Administrator if you've been given the privilege to issue demands. You need to have the proper privilege, or you will not see the Add Demand menu item.
2. If your company doesn't have an E-Subro Hub Administrator, its likely that your company is not setup as an active E-Subro Hub company. Please have an individual with appropriate authority contact Arbitration Forums about becoming an active E-Subro Hub company.

### **Adding a Demand**

To add a demand:

1. Verify that you are logged in with your user name and password.
2. Click **E-Subro** from the top level menu.
3. Select **Add Demand** from the drop down list.
4. In the Add Demand popup, locate the Responder Company by entering at least the first three characters of the Responder Company name. The system will display the names that match the entered characters.

**Note:** To include Subsidiary names in the list, click the *Show Subsidiaries* checkbox.

**Note:** Third Party Administrators will identify their client from the drop down list.

5. Hover over the desired company name, and E-Subro Hub will display the States in which that company participates.
6. Select the desired company from the list by clicking the appropriate row. Once this selection has been made, E-Subro Hub will ask for additional information needed to proceed.
7. Select the State of Loss from the drop down list.

**Note:** The participation list can be obtained by either using the mouse to hover over the desired name in the list or by using the down arrow key on the keyboard.

**Note:** This list only contains States in which you and the selected Responder Company are E-Subro Hub participants.

8. Enter YOUR claim/policy number in the appropriate field so that E-Subro Hub can check for demands that may be related to the one being created.

**Note:** If entering the claim/policy number via a Windows "Paste" function, the keyboard shortcut (Ctrl-V) is the recommended method.

9. Click **Save and Continue** to proceed with the demand creation OR click **Cancel** to end the creation of the demand.

10. After clicking Save and Continue, E-Subro Hub then pre-fills the collected information into the [Demand Detail tab](#), where you will continue with the demand creation process.

### — Adding a Demand - Counter/Companion

After entering your claim/policy number in the Add Demand screen, E-Subro Hub checks for the existence of any possible related demands. If demands are found that may be related, those demands will be displayed.

Depending on your relationship to the potentially related demand, you may have the option to create either a Companion or Counter Demand by clicking the appropriate button.

If you wish to proceed without relating the demand being created, click **Ignore and Continue** OR click **Back**.

### — Adding a Demand - Change Company/State

#### Change Company

After you have entered the required information and made the appropriate choices regarding any related demands, you will be taken to the Demand Detail tab. On this tab, you can change the Responder Company name using the following steps:

1. Click **Change Company**.
2. As described in the Adding a Demand section of this help, enter at least the first three characters of the desired company name with or without the *Show Subsidiaries* box checked to display the list of names that match the entered characters.
3. Select the desired company from the list by clicking the appropriate row.
4. Your selection of a different Responder Company may change the list of States in which you and the Respondent are both E-Subro Hub participants. Change the State of Loss, if necessary, using the drop down list.
5. Click **Save** to proceed OR click **Cancel** to return to the Demand Detail tab without saving any changes.

#### Change State

You may change the State of Loss using the following steps:

1. Click **Change State**.
2. Choose the desired state from the appropriate drop down list.
3. Click **Save** to proceed OR click **Cancel** to return to the Demand Detail tab without saving any changes.

**SEE ALSO:**

[Demand Detail Tab - Adding a Demand](#)

[Damages & Liability Tab - Adding a Demand](#)

[Evidence Tab - Adding a Demand](#)

[Demand Summary Tab - Adding a Demand](#)

[Validations and Related Cases - Adding a Demand](#)

## 5.1.2 Demand Detail Tab - Adding

Demand Details will initially be entered by the Demander who will be able to edit all of this information at any time during the life of the demand. The Responder will only have the ability to edit the detail information that pertains directly to them.

While the information in each section is fairly self explanatory, the following drop downs provide additional information about each section of the Demand Detail Tab:

### – Demander Company Information

Demander Company Information Field Definitions:

- **Company Name:** Required field which contains a list of pre-filled subsidiary names within the drop down menu from which the appropriate name can be chosen.
- **Customer Billing Code:** Required field which contains a list of pre-filled billing company information within the drop down menu from which the appropriate information can be chosen. Filled by default based on subsidiary.
- **Claim/Policy Number:** Required field used to enter the Demander's claim or policy number. When adding a new demand, the entry in this field will be used to search the database for demands that have been created with this number. If a demand is found, you will be given the option of creating a companion or counter demand depending on your role.
- **Line of Insurance:** Used to define a choice between personal or commercial insurance. The choice made here impacts what is seen in the following field.
- **Ins. First/Last Name** (Shown if Personal Line of Insurance is chosen): Used to enter the first and last name of the Demander's insured individual. The Last Name is a required field.
- **Driver** (Checkbox shown if Personal Line of Insurance is chosen): Used to indicate if the Demander's insured was driving the vehicle at the time of the accident. If this box is checked, the Driver First/Last Name field located under Demander Vehicle information will automatically populate with the phrase "Same as Insured".
- **Ins. Company Name** (Shown if Commercial Line of Insurance is chosen): Required field used to enter the name of the insured company.

### – Responder Company Information

Responder Company Information Field Definitions:

- **Company Name:** Required field that is populated via a search process which begins by clicking

the Select button. Partial entries of at least 3 characters can be used as search terms. The selection is made by clicking the desired company name from the search results.

- **Claim/Policy Number:** Used to enter the Responder's claim or policy number. The Claim/Policy Number field OR the Last Name (Company Name) is a required field.
- **Line of Insurance:** Used to define a choice between personal or commercial insurance. The choice made here impacts what is seen in the following field.
- **Ins. First/Last Name** (Shown if Personal Line of Insurance is chosen): Used to enter the first and last name of the Responder's insured individual. The Last Name OR the Claim/Policy Number field is a required field.
- **Driver** (Checkbox shown if Personal Line of Insurance is chosen): Used to indicate if the Responder's insured was driving the vehicle at the time of the accident. If this box is checked, the Driver First/Last Name field located under Responder Vehicle information will automatically populate with the phrase "Same as Insured".
- **Ins. Company Name** (Shown if Commercial Line of Insurance is chosen): Used to enter the name of the insured company. The Company Name OR the Claim/Policy Number field is a required field.

## Demander Vehicle Information

Demander Company Information Field Definitions:

- **Driver First/Last Name:** Used to enter the first and last name of the individual who was driving at the time of the accident if other than the insured. The phrase "Same as Insured" will automatically populate in this field if the Driver checkbox located under Demander Company Information is checked.
- **Bailment:** Used to indicate if the Demand involves a bailment situation.

**Note:** Bailment is the process of placing personal property or goods in the temporary custody or control of another with the expectation of the return of the property (such as in the case of giving one's car to a parking attendant or service professional). Some states have special requirements that could impact demands when a bailment is involved which is the reason this checkbox is provided. Typically, if you are unaware of why this checkbox would need to be used, you most likely will not need to use it.

- **Vehicle Year:** Used to enter the model year of the automobile about which the demand has been created.
- **Vehicle Make/Model:** Used to enter the manufacturer's brand and model of the automobile about which the demand has been created.
- **Lic. Plate State/Number:** Used to enter the state and number of the vehicle license plate.

## — Responder Vehicle Information

Responder Company Information Field Definitions:

- **Driver First/Last Name:** Used to enter the first and last name of the individual who was driving at the time of the accident if other than the insured. The phrase "Same as Insured" will automatically populate in this field if the Driver checkbox located under Responder Company Information is checked.
- **Vehicle Year:** Used to enter the model year of the automobile about which the demand has been created.
- **Vehicle Make/Model:** Used to enter the manufacturer's brand and model of the automobile about which the demand has been created.
- **Lic. Plate State/Number:** Used to enter the state and number of the vehicle license plate.

## — Loss Information

Loss Information Field Definitions:

- **Loss Date (mm/dd/yyyy):** Required field used to enter the date of the loss. This can be entered manually or by clicking **Select** and choosing the date from the calendar.
- **Loss City:** Used to enter the city in which the loss occurred.
- **Loss Location (e.g. street):** Used to enter the street address where the loss occurred.
- **Loss State:** Required field used to select the state in which the loss occurred.
- **Loss Facts (Demander):** Used to include any relevant facts pertaining to the demand.

## — Demander Rep Information

**Note:** The Demander Rep Information prefills from the logged in user's profile.

Demander Rep Information Field Definitions:

- **Contact Name:** Contains the Demander Rep name.
- **Address 1:** Contains the Demander Rep street address.
- **Address 2:** Contains the Demander Rep street address.
- **City/State/Zip:** Contains the Demander Rep city, state, and zip code.



- **Phone:** Contains the Demander Rep phone number.

## — Responder Rep Information

**Note:** These fields are optional. The Responder Rep Information changes automatically with each ownership change.

Responder Rep Information Field Definitions:

- **Contact Name:** Will contain the name associated with the user account that currently owns the Demand on the Responder side.
- **Address 1:** Will contain the street address associated with the user account that currently owns the Demand on the Responder side.
- **Address 2:** Will contain the street address associated with the user account that currently owns the Demand on the Responder side.
- **City/State/Zip:** Will contain the city, state, and zip code associated with the user account that currently owns the Demand on the Responder side.
- **Phone:** Will contain the phone number associated with the user account that currently owns the Demand on the Responder side.

## — Remittance Information

**Note:** On the first demand a user creates, these fields will be blank. Once they are completed, they will be prefilled in subsequently added demands.

In order to change current remittance information, simply change these fields while adding a new demand.

Remittance Information Field Definitions:

- **Remit payment to:** Contains a list of pre-filled names within the drop down menu from which the appropriate name can be chosen.
- **Address 1:** Contains the street address where Demand amount should be mailed.
- **Address 2:** Contains the street address where Demand amount should be mailed.
- **Attention:** Contains the contact name to whom the Demand amount should be mailed.
- **City/State/Zip:** Contains the city, state, and zip code where Demand amount should be mailed.
- **Phone:** Contains the phone number to be used for remittance questions.

Upon completion of the above information, "Save and Continue" and then proceed to the [Damages & Liability Tab](#) to continue with a demand creation.

**SEE ALSO:**

[Damages & Liability Tab - Adding a Demand](#)

[Evidence Tab - Adding a Demand](#)

[Demand Summary Tab - Adding a Demand](#)

[Validations and Related Cases - Adding a Demand](#)

### 5.1.3 Damages & Liability Tab - Adding

The Damages & Liability tab includes the entire negotiation history of the demand. This is the “Numbers” page for the demand. All negotiation actions will be recorded here.

#### – The Original Damages Pane

The Original Damages are the actual amounts paid out by a demander to their insured for a specific claim.

The Demander can make changes to the original damages using the [Edit Original Damages](#) action or by adding a [Supplement](#) to a demand that is not yet resolved. In that case, the supplement is treated like an edit to original damages and the modifications are applied to the Original Damages pane.

Original Damages Pane Field Definitions:

- **Auto Damages (Company Paid):** The dollar amount paid by the demanding company to resolve collision or comprehensive (OTC) coverage.
- **Rental:** The dollar amount for rental expense associated with the demand.
- **Towing:** The dollar amount for towing or similar expense associated with the demand.
- **Other Amount:** The dollar amount for other expenses associated with the demand but not the insured's out of pocket.
- **Deductible (Customer Paid):** The dollar amount that represents the collision or comprehensive deductible associated with the demand.
- **Total Loss / Salvage Amt:** The salvage amount represents the amount recovered or, in some cases, the loss on salvage. This field is only filled if the Total Loss checkbox was checked. Normally, the Salvage Amt value is deducted from the total damages value (thus it is written in red).

#### – The Negotiated Damages Pane

Negotiated Damages are demand amounts that reflect negotiation between the Demander and Responder.

When the Responder makes a counter offer, they are able to suggest changes to the damage amounts. These changes are reflected in the Negotiated Damages pane.

This also applies for the Demander. If they agree to suggested changes in the damages, they'll do so in a counter offer, or an acceptance of the responder offer. These changes will be reflected in the

Negotiated Damages pane.

Changes such as these would NOT modify the Original damages, as those should continue to reflect the actual damages that were paid.

The following damage descriptions are the same as those in the Original Damages pane. The only difference is that these amounts will reflect any negotiation that has occurred between the Demander and Responder.

Negotiated Damages Pane Field Definitions:

- **Auto Damages (Company Paid):** The dollar amount paid by the demanding company to resolve collision or comprehensive (OTC) coverage.
- **Rental:** The dollar amount for rental and/or loss of use expense associated with the demand.
- **Towing:** The dollar amount for towing or similar expense associated with the demand.
- **Other Amount:** The dollar amount for other expenses associated with the demand but not the insured's out of pocket.
- **Deductible (Customer Paid):** The dollar amount that represents the collision or comprehensive deductible associated with the demand.
- **Total Loss / Salvage Amt:** The salvage amount represents the amount recovered or lost in salvage. This field is only filled if the Total Loss checkbox was checked. Normally, the Salvage Amt value is deducted from the total damages value (thus it is written in red).

### — The Negotiated Liability Pane

The Responder Liability % is the percentage of liability for this incident that is being assigned to the Responder.

When this value resides in a Demander negotiation action step, it represents the liability % that the Demander thinks the Responder should accept. When this value resides in a Responder negotiation action step, it represents the liability % that the Responder is willing to accept.

The Responder Liability % is used to calculate the total demand or total response. The equation looks like this:

$$\text{Negotiated Liability} \times \text{Negotiated Damages} = \text{Total Demand}$$

### — The Total Demand/Total Response Pane

Total Demand is the amount that the Demander expects the Responder to repay for this subrogation demand. This pane is labeled Total Demand when the negotiation action step was completed by the Demander.

Total Response is the total amount that the Responder is willing to repay to the Demander. This pane is labeled Total Response when the negotiation action step was completed by the Responder.

"Demand Value Overridden" will appear in the Total Demand or Total Response section during a

negotiation action (Demand Issue, Counter Offer) if a user offers a lump sum and ignores the damages and liability. To do so, simply change the value in the field at the far right of the screen titled Total Demand.

### – Negotiation Message Pane

The negotiation message pane shows the message entered by the user that took the action. It should convey the reasoning behind the action being taken. Since the negotiation message is a required field, there should always be a negotiation message for each action.

### – Auto-Close Checkbox (Displays only if configured)

This option only appears on the Damages & Liability tab if Auto-Close has been configured by an administrator in E-Subro Hub Preferences.

By default, this box will be checked and the demand will close automatically upon Responder Acceptance or Responder Acknowledgement of Demander Acceptance.

Unselecting this option will override the Auto-Close action and the demand will remain open until it is closed manually.

Upon completion of the above information, "Save and Continue" then proceed to the [Evidence Tab](#) to continue with a demand creation.

#### SEE ALSO:

[Demand Detail Tab - Adding a Demand](#)

[Evidence Tab - Adding a Demand](#)

[Demand Summary Tab - Adding a Demand](#)

[Validations and Related Cases - Adding a Demand](#)

## 5.1.4 Evidence Tab - Adding

The evidence tab shows a list of the evidence items that have been attached to a demand.

Clicking the view link under the Action column allows you to open and view the evidence item. If the view text is not linked (view) that means the evidence item is not yet ready to be viewed.

Evidence items may be added as private documents thereby allowing only those within the party to view the evidence.

To sort the list of evidence, click the column title for the information you'd like to use as sorting criteria. For instance, click the Type column title to see an alphabetical sorting of items by type. Click it again, and the sort order will reverse (A to Z becomes Z to A).

### – Columns on the Evidence Tab

The following columns define the evidence list. At any time, you may click the Column title (its linked) to sort the list based on the information in that column.

- **Date Added:** The date and time that the evidence was added. This represents the time of the

initial creation of the evidence in the E-Subro Hub. For instance, if a Fax item is created, the date/time stamp will represent the time the item was initially save to the Hub, not the time the fax is finally received.

- **Added By:** The name of the person who added the item and their party definition (D or R)
  - **Method:** The method that was used to submit this item to the Hub: Upload, Fax, or Mail.
  - **Document Type/Description:** The type(s) of information in this evidence item and, if added, any corresponding description. Yes, it is possible to add documents to the system that contain multiple types of evidence. If more than one type is chosen, it will be viewable with a single entry in all columns except for this column where every type will be listed vertically.
- Note:** Obsolete Items will be marked in this column with a yellow triangle. You may hide or display the obsolete items by clicking the appropriate link just above the Actions column.
- **Status:** The status of the evidence document is shown here. Possible status types are Pending, Not Received, Completed, Error and Failed. For more information about what these status types mean, see the Status section on the [Adding Evidence](#) help page.
  - **Private:** Notes whether the other party can see this item or not. If a green checkmark appears in this column, the item is private and the other party cannot see it. If no green checkmark appears, then the other party can see the item. If the other party has added a private item, you won't see a green checkmark here. You simply will not see the item in the list.
  - **For Damages:** Shows which damage amount this item is associated with.

### Actions on the Evidence Tab

At the right hand side of each evidence item is a list of actions that can be taken on that item.

- **View:** Click to view the evidence document in PDF form. The "view" option will only be available once the document is present in the Hub (via upload, fax or postal mail completion)
- **Cover Sheet:** When an item has been saved using the Fax or Mail method, a Cover Sheet link will appear. This cover sheet contains a bar code that helps the E-Subro Hub identify the evidence item when it arrives via fax or mail, Click the link to view the cover sheet. For more information on completing a fax or mail submission, see Completing Fax and/or Mail Evidence Submissions in the [Adding Evidence](#) section.
- **Edit:** Allows the user to change the Type and/or Title of evidence items. Also, allows the user to mark a piece of evidence as obsolete if it is no longer relevant to the demand. No other information can be changed on the evidence.
- **Delete:** An evidence item can only be deleted prior to demand issuance.
- **Add Evidence:** This link allows you to add evidence to the demand. For more information on adding evidence, see the [Adding Evidence](#) section.

Upon completion of the above information, proceed to the [Demand Summary Tab](#) to complete the

demand creation.

**SEE ALSO:**

[Demand Detail Tab - Adding a Demand](#)

[Damages & Liability Tab - Adding a Demand](#)

[Demand Summary Tab - Adding a Demand](#)

[Validations and Related Cases - Adding a Demand](#)

### 5.1.5 Demand Summary Tab - Adding

The Demand Summary tab is essentially a summary page of the first three tabs: Demand Detail, Negotiation Detail, and Evidence.

#### **– Demand Summary Tab**

Use the contents of this page to review the details of the demand and, when ready, click the Issue Demand button to complete the demand creation. After the demand has been issued the user will have several command functions available to manage and resolve the demand.

Upon completion of the above information, the [Validations and Related Cases](#) screen may be shown.

**SEE ALSO:**

[Demand Detail Tab - Adding a Demand](#)

[Damages & Liability Tab - Adding a Demand](#)

[Evidence Tab - Adding a Demand](#)

[Validations and Related Cases - Adding a Demand](#)

### 5.1.6 Validations and Related Cases - Adding

When you attempt to issue the demand, the system will check to see if all of the requested fields and requested evidence have been populated. If requested evidence is missing, the Validations page will appear.

#### **– Validations and Related Cases**

This page will specify the information that is missing, so you can review it and decide whether to go back and provide it, or move forward and issue the demand.

Changes can be made to the missing information by clicking the **Edit** link located in the right hand column.

**SEE ALSO:**

[Demand Detail Tab - Adding a Demand](#)

[Damages & Liability Tab - Adding a Demand](#)

[Evidence Tab - Adding a Demand](#)

[Demand Summary Tab - Adding a Demand](#)

### 5.1.7 Quick Assign

The Quick Assign feature provides a fast and easy method of assigning individual demands. This feature will be very useful for assigning multiple demands in sequence such as would be done by a router. The ability to Quick Assign is a specific privilege that must be given by a Security Administrator to an individual user.

#### – Using Quick Assign

Choose **Quick Assign** from the top level AF menu.

The top of the screen provides a summary of the next demand to be assigned. The bottom of the screen allows you to search for and select the user or Business Unit to which the demand will be assigned.

You can Skip a demand. When skipped, the demand will not appear within Quick Assign again until you log out of the AF site.

Open this Demand will allow the user to access demands for additional review and actions.

Print this Demand will allow the user to create a PDF copy of the demand.

Back to List will allow the user to access the My Work List.

#### SEE ALSO:

[Assign Demand to User](#)

[Assign Demand to Business Unit](#)

[Assign Task to User](#)

[Assign Task to Business Unit](#)

[Take Ownership](#)

### 5.1.8 Assign Demand to User

The assign portion of the action menu bar provides essential commands that can be performed on the current demand.

**Note:** If the user's role includes routing initial demands, Quick Assign is a specialized privilege that will allow access to the demand assignment actions under the E-Subro menu → Quick Assign.

#### – User Search

You begin the assignment by entering the user search criteria.

- **Last Name, First Name:** Enter the name of the individual you are searching for.
- **Email:** If you know the individual's email, you may enter it here.
- **City, State:** The geographic location may help narrow the list of individuals you are searching through.

- **ZIP:** Address related information.
- **Company User ID:** If you know the individual's User ID, you may enter it here.

After you finish entering the criteria, click Search Profiles. From the list generated you will be able to select a user. If you leave all the fields empty and click Search Profiles then all users will be displayed in a list format.

Locate the desired user and click the Assign to User button next to the user you would like to assign to.

### – **Completing Assignment**

A complete assignment window pops up providing the following options:

- **Comment (optional):** Provides an optional method for entering a message to the assignee.
- **Complete:** Completes the assignment and confirms the assignment of the user.
- **Cancel:** This button brings you back to the list of users where you can make an alternate selection.

#### **SEE ALSO:**

[Assign Demand to Business Unit](#)

[Assign Demand to TPA](#)

[Assign Task to User](#)

[Assign Task to Business Unit](#)

[Take Ownership](#)

## **5.1.9 Assign Demand to Business Unit**

This action allows you to assign a demand directly to a Business Unit.

### – **Search/Select Business Units**

Upon entering this action a list of Business Units will appear.

To narrow the list of Business Units displayed, enter a portion of the Business Unit name in the search field and click **Search Business Units**.

Locate the desired Business Unit and click the **Assign to Unit** button next to the Business Unit to which you would like to assign.

### – **Completing Assignment**

A complete assignment window pops up providing the following options:

- **Comment (optional):** Provides an optional method for entering a message to the assignee.



- **Complete:** Completes the assignment and confirms the assignment of the user.
- **Cancel:** This button brings you back to the list of users where you can make an alternate selection.

**SEE ALSO:**

[Assign Demand to User](#)

[Assign Task to User](#)

[Assign Task to Business Unit](#)

[Take Ownership](#)

### 5.1.10 Assign Demand to TPA

- Select Assign
- Select Assign to TPA
- Enter TPA name
- Enter TPA Business Unit name
- Select Complete

**SEE ALSO:**

[Assign Demand to User](#)

[Assign Task to User](#)

[Assign Task to Business Unit](#)

[Take Ownership](#)

### 5.1.11 Reassign Demand from TPA to member

This action allows you to reassign a demand directly from a TPA to a Client Business Unit.

#### – Search/Select Client Business Unit

Upon entering this action a list of Client Business Units will appear.

Enter a portion of the Business Unit name in the search field and click **Search Business Units**.

Locate the desired Business Unit and click the **Assign to Unit** button next to the Client Business Unit to which you would like to assign.

#### – Completing Assignment

A complete assignment window pops up providing the following options:

- **Comment (optional):** Provides an optional method for entering a message to the assignee.
- **Complete:** Completes the assignment and confirms the assignment of the user.

- **Cancel:** This button brings you back to the list of users where you can make an alternate selection.

**SEE ALSO:**[Assign Demand to User](#)[Assign Task to User](#)[Assign Task to Business Unit](#)[Take Ownership](#)

### 5.1.12 Assign Demand to Client

This action allows you to assign a demand directly to a Business Unit.

#### – Search/Select Client Business Unit

Upon entering this action a list of Client Business Units will appear.

Enter a portion of the Business Unit name in the search field and click **Search Business Units**.

Locate the desired Business Unit and click the **Assign to Unit** button next to the Client Business Unit to which you would like to assign.

#### – Completing Assignment

A complete assignment window pops up providing the following options:

- **Comment (optional):** Provides an optional method for entering a message to the assignee.
- **Complete:** Completes the assignment and confirms the assignment of the user.
- **Cancel:** This button brings you back to the list of users where you can make an alternate selection.

**SEE ALSO:**[Assign Demand to User](#)[Assign Task to User](#)[Assign Task to Business Unit](#)[Take Ownership](#)

### 5.1.13 Assign Task to User

You can assign a task by choosing the applicable task for the user and by filling out the user search section.

Begin by selecting a task from the drop down menu.

#### – User Search

You begin the assignment by entering the user search criteria.

- **Last Name, First Name:** Enter the name of the individual you are searching for.
- **Email:** If you know the individual's email, you may enter it here.
- **City, State:** The geographic location may help narrow the list of individuals you are searching through.
- **ZIP:** Address related information.
- **Company User ID:** If you know the individual's User ID, you may enter it here.

After you finish entering the criteria, click Search Profiles. From the list generated you will be able to select a user. If you leave all the fields empty and click Search Profiles then all users will be displayed in a list format.

Locate the desired user and click the Assign to User button next to the user you would like to assign to.

### – Confirm Task Assignment

Once you click assign to user a confirm assignment of task to user is displayed. This is simply to confirm the name and email address of the person you picked.

The Message field provides a way of conveying an additional message to the assignee. This field is not required.

The available buttons for this screen are as follows:

- **Confirm:** Completes the assignment and assigns the user to the task.
- **Back to Search:** This button brings you back to the list of users where you can remake your selection.
- **Back to Demand:** When this button is clicked you go back to the current demand.

#### SEE ALSO:

[Assign Demand to User](#)

[Assign Demand to Business Unit](#)

[Assign Task to Business Unit](#)

[Take Ownership](#)

## 5.1.14 Assign Task to Business Unit

You can assign a task by choosing the applicable task for the business unit and by clicking **Assign to Unit** next to the business unit you wish to assign to.

Begin by selecting a task from the Choose Task drop down menu.

### – Search/Select Business Units

Upon entering this action a list of Business Units will appear.

To narrow the list of Business Units displayed, enter a portion of the Business Unit name in the search field and click **Search Business Units**.

Locate the desired Business Unit and click the **Assign to Unit** button next to the Business Unit to which you would like to assign.

### **Confirm Task Assignment**

Once you click assign to user a confirm assignment of task to user is displayed. This is simply to confirm the name and email address of the person you picked.

The Message field provides a way of conveying an additional message to the assignee. This field is not required.

The available buttons for this screen are as follows:

- **Confirm:** Completes the assignment and assigns the user to the task.
- **Back to Search:** This button brings you back to the list of users where you can remake your selection.
- **Back to Demand:** When this button is clicked you go back to the current demand.

#### **SEE ALSO:**

[Assign Demand to User](#)

[Assign Demand to Business Unit](#)

[Assign Task to User](#)

[Take Ownership](#)

## **5.1.15 Assign Task to Client**

You can assign a task by choosing the applicable task for the client business unit and by clicking **Assign to Unit** next to the business unit you wish it to be assigned.

Begin by selecting a task from the Choose Task drop down menu.

### **Search/Select Client Business Units**

Upon entering this action a list of Business Units will appear.

To narrow the list of Client Business Units displayed, enter a portion of the Business Unit name in the search field and click **Search Business Units**.

Locate the desired Client Business Unit and click the **Assign to Unit** button next to the Business Unit to which you would like to assign.

### **Confirm Task Assignment**

Once you click assign to user a confirm assignment of task to user is displayed. This is simply to confirm the name and email address of the person you picked.

The Message field provides a way of conveying an additional message to the assignee. This field is not required.

The available buttons for this screen are as follows:

- **Confirm:** Completes the assignment and assigns the user to the task.
- **Back to Search:** This button brings you back to the list of users where you can remake your selection.
- **Back to Demand:** When this button is clicked you go back to the current demand.

**SEE ALSO:**

[Assign Demand to User](#)

[Assign Demand to Business Unit](#)

[Assign Task to User](#)

[Take Ownership](#)

## 5.1.16 Take Ownership

**Note:** Take Ownership applies when the [E-Subro Hub Preferences](#) are set to Activate Two Step Demand Assignment Process. This is a company configuration item and is a rare workflow option. The "Take Ownership" action will also be available if you are reviewing a demand owned by another user or business unit AND you have the Subro Change Ownership privilege.

When entering a demand that has been assigned to you by another user, a Complete Demand Ownership Assignment screen will be displayed.

### – Take Ownership Options: Two Step Demand Assignment Process

You have the following choices from this screen:

- **Take Ownership:** This completes the ownership transfer and removes the demand from the work list of the user who assigned it.
- **View Only:** This option allows you to view the contents of the demand without accepting ownership. In this scenario, the demand remains in an outstanding state and will continue to be visible on the work list of the assigner.

### – Take Ownership - Other Owner

Take Ownership: Access the demand and click the Assign command → Take Ownership to assume ownership of the demand.

Note: if ownership was taken from a business unit, the demand can be released back to that business unit without using the Assign Demand to Business Unit action.

**SEE ALSO:**[Assign Demand to User](#)[Assign Demand to Business Unit](#)[Assign Task to User](#)[Assign Task to Business Unit](#)

### 5.1.17 Release Ownership

**Note:** The "Release Ownership" action will also be available if you are reviewing a demand that you took ownership from a business unit AND you have the Subro Change Ownership privilege.

You can only Release Ownership back to the business unit that you took ownership from.

### 5.1.18 FNOL

When you mark a demand as FNOL, you are indicating that this is the first time you have been made aware of a loss.

#### – Marking as FNOL

When you wish to mark a demand as FNOL, you are required to add a message to document the file. Once this action has been taken on a demand you cannot use this action again on the same demand.

This can be accomplished by choosing the **Negotiate** menu → **FNOL**.

Enter your message and click **Mark as FNOL** to commit the change.

**SEE ALSO:**[Investigating](#)[Print Demand](#)

### 5.1.19 Investigating

When you mark a demand as Investigating, you are indicating that additional time is needed until you are able to continue working the demand.

#### – Marking as Investigating

When you wish to mark a demand as Investigating, you are required to add a message to document the file.

This can be accomplished by choosing the **Negotiate** menu → **Investigating**.

Enter your message and click **Mark as Investigating** to commit the change.

**SEE ALSO:**

[FNOL \(First Notice of Loss\)](#)

[Print Demand](#)

## 5.1.20 Request Information

The Request Information feature provides a negotiation action used to request additional information about a demand from the opposing party.

Use Request Information as a method of asking the opposing party for information not included in the demand which you deem necessary to proceed. When using this feature, the Action Flag will be moved to the opposing party to ensure the demand will be displayed on their work list.

### – Issuing a Request for Information

Click **Request Info** on the action button menu OR select **Request Information** from the **Negotiate** drop down menu.

Enter your desired message in the appropriate field specifying what additional information is needed and click **Issue Request for Information**.

Click **Cancel** to return to the previous screen.

**Note:** this action will put an Action Flag to the opposing party.

### – Responding to a Request for Information

Incoming requests can be viewed from within the Action Flag popup, within the Activity Log or in the Demand Detail Tab.

When an incoming request is active and you take a specific action (Edit Details, Add Evidence, Send Message), a popup asks if the action satisfies the Request for Information. The popup will not appear if you add evidence using the AF Client option.

Any action that changes the Action Flag automatically removes the request. For example, a Counter Offer by either party causes the Action Flag to change and thus removes the request.

The request can also be manually cleared from the Action Flag popup.

**SEE ALSO:**

[Demand Detail Tab - Adding a Demand](#)

[Damages & Liability Tab - Adding a Demand](#)

[Evidence Tab - Adding a Demand](#)

[Demand Summary Tab - Adding a Demand](#)

[Validations and Related Cases - Adding a Demand](#)

### 5.1.21 Reply to a Request

The Reply to a Request functionality allows users to post public or private replies. Replies posted will associate themselves to the current demand in progress.

#### — Adding a Reply to a Request

To send a reply, choose the desired link from the **Negotiate > Reply to a Request** menu.

Enter the text of your reply in the text box and click the corresponding Send/Add button to insert the message or note.

**Note:** the Add Message option will be visible to both parties' Activity Log and will put a Message icon on the opposing party's Work List. The Add Internal Note option will not be visible on the opposing party's Activity Log.

When the message is saved it will then display in the Activity Log. Choose the Less Detail option to focus primarily on messages and notes.

**SEE ALSO:**

[Add Evidence](#)

[Add Payment](#)

[Close Demand](#)

[Edit Damages Worksheet](#)

[Edit Demand Detail](#)

[Edit Liability Worksheet](#)

[Print Demand](#)

### 5.1.22 Counter Offer

The negotiate section of the action menu bar allows the demander and responder to negotiate on the current demand.

#### — Making a Counter Offer

To initiate a counter offer, click **Negotiate** in the secondary menu and choose **Counter Offer** from the drop down list OR click **Counter** from the menu bar.

The counter option brings you to the Damages & Liability tab where you can issue a counter by editing the Negotiated Damages entries and/or the Liability entry.

The user can enter a specific amount in the Total Demand entry and override the automated calculations. The Negotiation Message is a required field so a message must be entered.

When you have entered the appropriate details and completed the required Negotiation Message, click **Issue Counter**, **Issue Counter & Upload Evidence**, or **Cancel**.

**Note:** this action will put an Action Flag to the opposing party.

**SEE ALSO:**

[Accept](#)

[Edit Original Damages](#)

[Supplement](#)



[Reopen](#)  
[Arbitrate](#)

### 5.1.23 Accept

The Accept action is used to tell the other party that you will accept their most recent offer.

#### — Accepting an Offer

1. To initiate the Accept action, click **Accept** in the action button menu OR open the demand and click **Negotiate > Accept**.

**Note:** the Accept menu item will only be available from the demand side once the other party has made a counter offer.

2. To complete the Accept action, click the **Accept** button. The Negotiation Message is not a required field but a note can be added if appropriate.
3. Upon completion, E-Subro Hub will tell you that the Accept action was completed.

**Note:** In the current system configuration, clicking "Accept" confirms you are accepting Liability AND Damages at the current negotiation and this action will be a matter of record in the demand activity log. Should arbitration be filed to recover an additional balance, record of having accepted an offer can be submitted as evidence.

#### SEE ALSO:

[Counter Offer](#)  
[Edit Original Damages Supplement](#)  
[Reopen](#)  
[Arbitrate](#)

### 5.1.24 Deny

The Responder can choose to deny the demand. This action communicates to the Demander that you are unwilling to accept liability for the incident (Responder Liability is set to 0%), and that you are unwilling to pay anything on this demand (Total Response is set to \$0.00).

#### — Denying an Offer

For communication reasons, its best to choose a Reason for Denial.

A Negotiation Message is required on the Deny action.

After making the appropriate selection and entering a message, click **Deny** to commit the action.

**Note:** this action will put an Action Flag to the opposing party.

**SEE ALSO:**

[Counter Offer](#)  
[Accept](#)

### 5.1.25 Arbitrate

The process of sending a demand to arbitration has been greatly eased by E-Subro Hub.

#### – Sending a Demand to Arbitration

If you find that you can not reach an agreement about a particular demand, you can easily send that demand to arbitration by selecting Arbitrate from under **Negotiate** in the secondary menu.

All of the information in the demand will be automatically transferred into the new Arbitration case.

**SEE ALSO:**

[Counter Offer](#)  
[Accept](#)  
[Edit Original Damages](#)  
[Supplement](#)  
[Reopen](#)

### 5.1.26 Task Assigner

If you've assigned tasks to other users, you'll need a way to see those tasks, and determine their status. The [My Tasks](#) page can help you do this.

Use the filter section at the top of the page to focus the list of tasks.

See the Task Status column to determine if the task is Open or Completed or Reassigned.

The [My Tasks](#) page contains the following:

#### – Task Filter Options

Click **Show Filter Details** to open the filter. Use the filters in the Task Filter page to narrow the list of tasks. This lets you view only those that matter to you.

- **Role:** Allows you to set the filter according to your role. Select **I am the assigner** to show only the tasks you have assigned.
- **Task Type:** Allows you to focus on a certain type of task such as Add Evidence, Verify Damage Amounts, or Determine Liability.
- **Status:** Allows you to narrow the search based on whether the task has been flagged as Open, in Process, Completed, Rejected or Errored.
- **Retrieve Tasks:** Used to change the list of results each time a change is made to a filter.

## – Tasks and Task Status

After the filter has been applied, tasks and task statuses are shown in the list.

The task name in the Task column displays as a link.

Click the task name (e.g. Verify Damage Amounts) to move directly to the page where the task information exists.

TPA column notes if the demand is being handled by a TPA.

## – Task Assignment

To assign a task to another user or business unit, open the demand for which the task will be assigned.

In the Demand Action Menu Bar, click the Assign menu item and choose the type of assignment you'd like to complete.

- **Assign Task to User:** Assigns a task to an individual. The individual will be able to see a listing of tasks to be completed.
- **Assign Task to Business Unit:** Assigns a group of individuals in a business unit a task to perform on a demand.

For more specific information regarding Assigning Tasks, see the [Assign Task to User](#) or [Assign Task to Business Unit](#) page.

### SEE ALSO:

[Task Assignee](#)

## 5.1.27 Task Assignee

As a person who is looking to complete a task you will have to modify the filter to display tasks that are assigned to you and click on the task you wish to perform. Tasks that have been assigned to you can be accessed through the E-Subro menu → My Demands → My Work List or E-Subro menu → My Tasks.

## – Task Filter Options

Click **Show Filter Details** to open the filter. Use the filters in the Task Filter page to narrow the list of tasks. This lets you view only those that matter to you.

- **Role:** Allows you to set the filter according to your role. Select ***I am the assigner*** to show only the tasks you have assigned.
- **Task Type:** Allows you to focus on a certain type of task such as Add Evidence, Verify Damage Amounts, or Determine Liability.

- **Status:** Allows you to narrow the search based on whether the task has been flagged as Open, In Process, Completed, Rejected or Errored.
- **Retrieve Tasks:** Used to change the list of results each time a change is made to a filter.

### – **Tasks and Task Status**

After the filter has been applied, tasks and task statuses are shown in the list.

The task name in the Task column displays as a link.

Click the task name (e.g. Verify Damage Amounts) to move directly to the page where the task information exists.

TPA column notes if the demand is being handled by a TPA.

### – **Completing the Task**

1. **Attach Evidence:** Access the demand from E-Subro → My Tasks → Demand or Task Name link. Review the task message on the Evidence tab. Complete the task then click Flag Complete command.
2. **Verify Damage Amount:** Access the demand from E-Subro → My Tasks → Demand or Task Name link. Review the task message on the Damages Worksheet page. Edit the worksheet if appropriate. Change the Task Status: Open, In Process, Completed.
3. **Verify Liability Decision:** Access the demand from E-Subro → My Tasks → Demand or Task Name link. Review the task message on the Liability Worksheet page. Edit the worksheet if appropriate. Complete the task by clicking Flag Task Complete.

**SEE ALSO:**

[Task Assigner](#)

## **5.1.28 Edit Original Damages**

This option brings the user to an editable Original Damages pane.

The Damages & Liability tab includes the Original Damages pane that acts as an input calculator for calculations to be displayed in the other panes. For example, amounts will be entered under each category in the Original Damages and redisplayed in the Negotiated Liability and Total Demands pane.

It should only be necessary to edit the original damages if an entry was incorrectly entered or an item was omitted at the time of entry.

### – **The Original Damages Pane**

The Original Damages are the actual amounts paid out by a demander to their insured for a specific claim.

The Demander can make changes to the original damages using the [Edit Original Damages](#) action or

by adding a [Supplement](#) to a demand that is not yet resolved. In that case, the supplement is treated like an edit to original damages and the modifications are applied to the Original Damages pane.

Original Damages Pane Field Definitions:

- **Auto Damages (Company Paid):** The dollar amount paid by the demanding company to resolve collision or comprehensive (OTC) coverage.
- **Rental:** The dollar amount for rental expense, paid by the demanding company, associated with the demand.
- **Towing:** The dollar amount for towing or similar expense associated with the demand.
- **Other Amount:** The dollar amount for other expenses associated with the demand but not the insured's out of pocket.
- **Deductible (Customer Paid):** The dollar amount that represents the collision or comprehensive deductible associated with the demand.
- **Total Loss / Salvage Amt:** The salvage amount represents the amount recovered or lost in salvage. This field is only filled if the Total Loss checkbox was checked. Normally, the Salvage Amt value is deducted from the total damages value (thus it is written in red).

### — The Negotiated Liability Pane

The Responder Liability % is the percentage of liability for this incident that is being assigned to the Responder.

When this value resides in a Demander negotiation action step, it represents the liability % that the Demander thinks the Responder should accept. When this value resides in a Responder negotiation action step, it represents the liability % that the Responder is willing to accept.

The Responder Liability % is used to calculate the total demand or total response. The equation looks like this:

$$\text{Negotiated Liability} \times \text{Negotiated Damages} = \text{Total Demand}$$

### — Negotiation Message Pane

The negotiation message pane shows the message entered by the user that took the action. It should convey the reasoning behind the action being taken. Since the negotiation message is a required field, there should always be a negotiation message for each action.

**SEE ALSO:**

[Counter Offer](#)

[Accept](#)

[Supplement](#)

[Reopen](#)

[Arbitrate](#)

## 5.1.29 Edit Demand Detail

While viewing a demand, you can be transferred to the edit demand mode by clicking the Edit Detail link located in the upper right corner of the Demand Detail tab. This button converts viewable fields into editable fields. This same action can be accessed from the **Manage Demand** menu → **Edit Demand Details**.

Click **Save** to commit any changes.

### – Demander Company Information

Demander Company Information Field Definitions:

- **Company Name:** Required field which contains a list of pre-filled subsidiary names within the drop down menu from which the appropriate name can be chosen.
- **Claim/Policy Number:** Required field used to enter the Demander's claim or policy number. When adding a new demand, the entry in this field will be used to search the database for demands that have been created with this number. If a demand is found, you will be given the option of creating a companion or counter demand depending on your role.
- **Line of Insurance:** Used to define a choice between personal or commercial insurance. The choice made here impacts what is seen in the following field.
- **Ins. First/Last Name** (Shown if Personal Line of Insurance is chosen): Used to enter the first and last name of the Demander's insured individual. The Last Name is a required field.
- **Driver** (Checkbox shown if Personal Line of Insurance is chosen): Used to indicate if the Demander's insured was driving the vehicle at the time of the accident. If this box is checked, the Driver First/Last Name field located under Demander Vehicle information will automatically populate with the phrase "Same as Insured".
- **Ins. Company Name** (Shown if Commercial Line of Insurance is chosen): Required field used to enter the name of the insured company.

### – Responder Company Information

Responder Company Information Field Definitions:

- **Company Name:** Required field that is populated via a search process which begins by clicking the Select button. Partial entries of at least 3 characters can be used as search terms. The selection is made by clicking the desired company code from the search results.
- **Claim/Policy Number:** Used to enter the Responder's claim or policy number. The Claim/Policy Number field OR the Last Name (Company Name) is a required field.
- **Line of Insurance:** Used to define a choice between personal or commercial insurance. The

choice made here impacts what is seen in the following field.

- **Ins. First/Last Name** (Shown if Personal Line of Insurance is chosen): Used to enter the first and last name of the Responder's insured individual. The Last Name OR the Claim/Policy Number field is a required field.
- **Driver** (Checkbox shown if Personal Line of Insurance is chosen): Used to indicate if the Responder's insured was driving the vehicle at the time of the accident. If this box is checked, the Driver First/Last Name field located under Responder Vehicle information will automatically populate with the phrase "Same as Insured".
- **Ins. Company Name** (Shown if Commercial Line of Insurance is chosen): Used to enter the name of the insured company. The Company Name OR the Claim/Policy Number field is a required field.

### — Demander Vehicle Information

Demander Company Information Field Definitions:

- **Driver First/Last Name:** Used to enter the first and last name of the individual who was driving at the time of the accident if other than the insured. The phrase "Same as Insured" will automatically populate in this field if the Driver checkbox located under Demander Company Information is checked.
- **Bailment:** Used to indicate if the Demand involves a bailment situation.

**Note:** Bailment is the process of placing personal property or goods in the temporary custody or control of another with the expectation of the return of the property (such as in the case of giving one's car to a parking attendant or service professional). Some states have special requirements that could impact demands when a bailment is involved which is the reason this checkbox is provided. Typically, if you are unaware of why this checkbox would need to be used, you most likely will not need to use it.

- **Vehicle Year:** Used to enter the model year of the automobile about which the demand has been created.
- **Vehicle Make/Model:** Used to enter the manufacturer's brand and model of the automobile about which the demand has been created.
- **Lic. Plate State/Number:** Used to enter the state and number of the vehicle license plate.

### — Responder Vehicle Information

Responder Company Information Field Definitions:

- **Driver First/Last Name:** Used to enter the first and last name of the individual who was driving at the time of the accident if other than the insured. The phrase "Same as Insured" will

automatically populate in this field if the Driver checkbox located under Responder Company Information is checked.

- **Vehicle Year:** Used to enter the model year of the automobile about which the demand has been created.
- **Vehicle Make/Model:** Used to enter the manufacturer's brand and model of the automobile about which the demand has been created.
- **Lic. Plate State/Number:** Used to enter the state and number of the vehicle license plate.

### — Loss Information

Loss Information Field Definitions:

- **Loss Date (mm/dd/yyyy):** Required field used to enter the date of the loss. This can be entered manually or by clicking **Select** and choosing the date from the calendar.
- **Loss City:** Used to enter the city in which the loss occurred.
- **Loss Location (e.g. street):** Used to enter the street address where the loss occurred.
- **Loss State:** Required field used to select the state in which the loss occurred.
- **Loss Facts (Demander):** Used to include any relevant facts pertaining to the demand.

### — Demander Rep Information

**Note:** The Demander Rep Information prefills from the logged in user's profile.

Demander Rep Information Field Definitions:

- **Contact Name:** Contains the Demander Rep name.
- **Address 1:** Contains the Demander Rep street address.
- **Address 2:** Contains the Demander Rep street address.
- **City/State/Zip:** Contains the Demander Rep city, state, and zip code.
- **Phone:** Contains the Demander Rep phone number.

### — Responder Rep Information

**Note:** These fields are optional. The Responder Rep Information changes automatically with each ownership change.



Responder Rep Information Field Definitions:

- **Contact Name:** Will contain the name associated with the user account that currently owns the Demand on the Responder side.
- **Address 1:** Will contain the street address associated with the user account that currently owns the Demand on the Responder side.
- **Address 2:** Will contain the street address associated with the user account that currently owns the Demand on the Responder side.
- **City/State/Zip:** Will contain the city, state, and zip code associated with the user account that currently owns the Demand on the Responder side.
- **Phone:** Will contain the phone number associated with the user account that currently owns the Demand on the Responder side.

### — Remittance Information

**Note:** On the first demand a user creates, these fields will be blank. Once they are completed, they will be prefilled in subsequently added demands.

In order to change current remittance information, simply change these fields while adding a new demand.

Remittance Information Field Definitions:

- **Remit payment to:** Contains a list of pre-filled names within the drop down menu from which the appropriate name can be chosen.
- **Address 1:** Contains the street address where Demand amount should be mailed.
- **Address 2:** Contains the street address where Demand amount should be mailed.
- **Attention:** Contains the contact name to whom the Demand amount should be mailed.
- **City/State/Zip:** Contains the city, state, and zip code where Demand amount should be mailed.
- **Phone:** Contains the phone number to be used for remittance questions.

**SEE ALSO:**

[Add Evidence](#)

[Add Message](#)

[Add Payment](#)

[Close Demand](#)

[Edit Damages Worksheet](#)

[Edit Liability Worksheet](#)

[Print Demand](#)

### 5.1.30 Add Evidence

The E-Subro Hub allows users to add evidence directly to a demand. This can be external evidence used to make a case for re-payment, or it can be internal evidence that is only to be seen by members of your own company.

**Note:**

- Evidence cannot be deleted after the demand has been issued. Once evidence has been added and the demand issued, the E-Subro Hub will not let you delete it. This is to prevent disputes about what evidence might or might not have been present at certain times during the demand process. If the demand has not yet been issued, you can delete evidence.
- The Viewable by Other Parties choice is irreversible in the Public status. When adding evidence, you may add evidence to be seen by your party only, the Private status. To do so you must uncheck the “Viewable by Other Parties” check box. This choice can be changed after the initial save of the evidence item, to make the evidence viewable by the other party. Once in the Public status, evidence cannot be changed to the Private status.

#### — Adding Evidence

Adding Evidence can be accomplished using one of several methods.

From the Evidence tab, click the Add a Document link (upper right hand corner) to open an Add a Document pop-up. You may open up to ten Add a Document pop-ups to complete the addition of multiple evidence items at one time.

Or, choose **Manage Demand > Add Evidence** from the secondary menu.

Evidence can also be added by choosing **Issue Counter & Upload Evidence** in the Counter Offer function.

#### — Evidence Type / Evidence Types Contained

Choose the appropriate evidence types under the section labeled Choose All Evidence Types That This Document Contains.

Examples include a .jpg file with a single photograph, a .doc (word doc) containing both the Estimate and three scene photographs, or perhaps a .pdf file containing all pertinent evidence for the case. Clicking all types that apply helps you (and the other party) find the evidence more quickly and easily once its been added.

See Supported File Types in this topic for additional information.

Once you have chosen the Evidence Types by clicking the corresponding icon, a line item will be displayed under Evidence Types Contained in this Document.

You may add an optional description in the provided field or remove the item using the Remove icon to the right of the line item.

The evidence can be submitted individually or as a bundle. In other words, you can select one type of evidence related to a single document, or you can select multiple types if the single document contains those items in one file.

## – Submit Method

The Submit Method provides a choice about you get the information into E-Subro Hub. The following describes each method:

- **Upload:** A direct upload of the Evidence file from your system to E-Subro Hub. If you have direct access to the evidence as a file (like a .doc or a .jpg file) this is the easiest and fastest way to add evidence.

To use this method, choose **Upload** under Submit Method and then click the **Browse** button (far right) to select the file (from your computer's file system) to be uploaded.

**Note:** the Upload method is similar to attaching a document to an e-mail.

- **Fax:** Send your evidence items via a fax machine.

Select the appropriate evidence types to indicate what you'll be sending, then click **Save Evidence**. E-Subro Hub provides a bar coded cover sheet for use with the faxed document(s). The bar code contains information about the demand and the evidence including where to place the documents so they can be viewed in the evidence tab. The fax option should not be used for photos as the fax quality usually doesn't transmit enough detail to end up with a clear photo.

## – Browse for File to Upload

If Upload is the chosen submission method, use the **Browse** button to find the file to upload from within your computer's file directory.

Browse to the appropriate folder within your directory, choose the file and click the **Open** button at the bottom right of the Choose File popup.

Note that the chosen file (with file path) is automatically populated in the File field.

**Note:** the Upload method is similar to attaching a document to an e-mail.

## – Evidence Types Contained in this Document

This field is populated with the Types chosen earlier in the process. The description text may be entered by clicking in the field and typing the desired text.

## – Viewable by other parties

The last decision to make about adding this piece of evidence is whether to make the evidence viewable by other parties or not.

Caution is advised regarding this choice as once an evidence item is saved as viewable by other parties, this setting is locked and cannot be changed. If the evidence item is saved as NOT viewable by other parties, it can be made viewable any time during the negotiations and will then be locked in the viewable status.

- **Checked:** By checking the box (default), the evidence will be viewable to the other party in this demand (for instance, if you're the demander, this checkbox allows the responder to see the evidence item)
- **Unchecked:** If you uncheck the box, only your party (ie. your company) will be able to see the item.

### — Save Evidence

To complete the process click the **Save Evidence** button. If any data issues exist, they will have to be corrected in order to proceed. Issue messages will be shown in red (near the pop-up where the problem exists).

Once the evidence has been saved a message will appear in the top left corner stating that it was saved successfully.

### — AFClient

The AFClient software provides an easy alternative method for attaching claim related documents and evidence to a demand within E-Subro Hub.

It consists of two components: AFPrint and AFScan.

For additional information about this topic, see the [AFClient User Guide](#).

### — Status

The Status column provides a quick method for understanding what's happening with the associated demand.

Status type definitions:

- **Pending:** The evidence item is received but processing is ongoing. An item is not viewable while the status is Pending.
- **Not Received:** The evidence item has not yet been received by E-Subro Hub. This usually occurs when the evidence item was added via the Fax method, and the fax transmission has not yet been received and processed.
- **Available:** The evidence item is in E-Subro Hub. The View link should be active, allowing users to see the stored item.
- **Error:** The system is trying to process the evidence item but is having a problem. When an item is in the Error status it will be retried for a certain number of times. If the error status cannot be resolved it will move to the Failed status. When the item is in Error status click the Error link for more information about the error.
- **Failed:** The system attempted to process the evidence item but could not. When the item is in Failed status click the Failed link for more information. One common cause of failure is the use of

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an unsupported file type. See Supported File Types in this topic for additional information.

## **Supported File Types**

E-Subro Hub only supports certain file types for upload.

A file type is the 3 or 4 letter extension at the end of each filename. For instance, for the picture file Picture1.jpg, the .jpg is the file type.

If you try to upload a file with an unsupported file type into E-Subro Hub, it will fail and the document will not be viewable. Below is a list of supported file types:

- .bmp
- .doc
- .gif
- .jff
- .jpe
- .jpeg
- .jpg
- .pdf
- .png
- .pps
- .ppt
- .rtf
- .tif
- .tiff
- .txt
- .xls
- .xlw

## — Completing Fax Evidence Submissions

When you choose to submit the evidence via Fax, the submission does not end with the click of the Save Evidence button. You must also complete the final step of sending the fax.

Print the cover sheet for the Fax items. Note that the cover sheet link appears on the right side of the screen, under the Actions column.

The bar code on the cover sheet tells the E-Subro Hub where to place the documents behind it.

Steps to complete the submission:

1. Print the cover sheet
2. Place the cover sheet on the top of the evidence item you're faxing. Each evidence item requires a separate cover sheet. For example, if three items in the evidence tab have cover sheets, you must print all three of the cover sheets and place them on top of the corresponding evidence item. This is the only way the system will know where to place your item (so you can find it and view it). If faxed evidence will be submitted at one time, the user can choose to select several evidence types for a single cover sheet.
3. Place the evidence package into your fax machine and send it to the number on the Fax cover sheet: (813) 889-4060

### SEE ALSO:

[Add Message](#)

[Add Payment](#)

[Close Demand](#)

[Edit Damages Worksheet](#)

[Edit Demand Detail](#)

[Edit Liability Worksheet](#)

[Print Demand](#)

### 5.1.31 Add Internal Note

The add internal note function will create a note that will only be seen by users from your company or an authorized representative. This note will not be seen by the opposing party.

### 5.1.32 Send FYI

Provides Demanders and Responders a method to send an information-only message to the other party that requires no response. The Action Flag status will remain unchanged.

### 5.1.33 Manual Settlement Override

Use this action when you've reached a settlement with the Responder but you cannot get the Demand into the accepted status. E-Subro Hub will not notify the Responder that this action has occurred. Payment arrangements should be made prior to completing this action.

### 5.1.34 Diaries


The Diary is used to suppress an Action Flag in an attempt to remove the demand from [My Work List](#) for a specified period of time.

Diaries are associated with a specific demand rather than a specific user. This means that any diaries which are set for a given demand will stay with that demand even if the ownership changes.


**Note:** This will remove it from [My Work List](#) as long as no other factors exist that would keep it on the list. These factors include: (a) A Message Flag is present or, (b) You have an unfinished task assigned to you.

### – Set Diary

The Set Diary action can be invoked:

1. From any Demand List by clicking the  icon and then choosing the **Set Diary** link.
2. From an Action Flag on the Demand List or within the demand.


Once you've chosen the Set Diary action and the Set Diary popup appears:

1. Enter the number of days before the Diary expires in the Expires In column.  
OR
2. Enter the date you wish the Diary to expire by selecting it from the Calendar ().
3. Add a comment that will remind you why a diary was set. (The more specific you are here, the less time you'll spend trying to figure out what your next step is when the Diary expires and the demand returns to My Work List).
4. Click the **Set Diary** button to complete the action

A grey flag will appear in the demand, representing the Diary.


### – Set a New Diary

When you want to remove an existing diary and create a new one immediately, use the Set New Diary feature to do it all in one action.

The Set New Diary action can be invoked from within an Action Flag on the Demand List or a Demand by clicking the Diary Flag  and then choosing the Set New Diary link or from the **Manage Demand** menu → **Set New Diary**. This can be done for an active diary or an expired diary.


### – Cancel Diary

When you want to remove an existing diary, use the Cancel Diary feature.

The Cancel Diary action can be invoked from within an Action Flag on the Demand List or a Demand by clicking the Diary Flag  and then choosing the Cancel Diary link or from the **Manage Demand** menu → **Cancel Diary**..

### – Dismiss Expired Diary

When a diary has expired, it will either "unsuppress" the Action Flag or create a new Action Flag that exists only because the diary expired. Either way a red Action Flag will remain on your demand. If you want to remove the demand from your Work List, and the Action Flag only exists due to the expired diary, use the Dismiss Expired Diary link to accomplish your goal.

The Dismiss Expired Diary action can be invoked from the Demand List or within a Demand by clicking the Action Flag  and then choosing the Dismiss Expired Diary link.

### – Automatic Diaries

Automatic Diaries are diaries that get set automatically when a certain event occurs in E-Subro Hub. Currently, there are two events which trigger Automatic Diaries.

1. **Issue Demand:** When a demand is Issued, an Automatic Diary is created on the demand. The number of days is set by Company configuration. The diary is associated with the demand for which it is created and will move with the demand if the demand is assigned to another user.
2. **Acceptance:** When a demand is accepted (by the Demander or the Responder) an Automatic Diary is created for the Demander. The number of days is set by Company configuration. This removes the demand from the Demander's My Work List while awaiting payment, unless "Auto Close" is configured, but also prevents the demand from being forgotten.

**SEE ALSO:**

[My Work List](#)

[Other Preset Demand Lists](#)

[Custom Demand Lists](#)

[Demand List Icons](#)

[Search for a Demand](#)

## 5.1.35 Companion Demand

Creating a companion demand eases the data entry burden associated with creating a new demand by copying some of the demand information from an existing demand.

### – Adding a Companion Demand

A companion demand is created by selecting **Create Companion Demand** from the **Manage Demand** drop down menu.

The creation of a Companion Demand prefills some information from the original demand into the appropriate locations in the new demand. From this point the demand can be processed like any new demand.

For a Companion Demand, only the Demander Company Information, Demander Vehicle Information, and the Loss Information will be prefilled.

Only your party's evidence will be copied from the original demand based on the availability of the



evidence. Your evidence will be copied into the new demand if it is both available in the system and not marked as obsolete. Items that were marked private in the original demand will remain private in the new demand.

**SEE ALSO:**

[Demand Creation](#)

[Demand Detail Tab - Adding a Demand](#)

[Damages & Liability Tab - Adding a Demand](#)

[Evidence Tab - Adding a Demand](#)

[Demand Summary Tab - Adding a Demand](#)

[Validations and Related Cases - Adding a Demand](#)

## 5.1.36 Supplement

The supplement action allows you to enter supplemental damages into the current demand.

### — Entering Supplemental Damages

To enter Supplemental Damages, click **Supplement** from the action button menu OR choose **Manage Demand > Supplement** from the secondary menu.

You will be prompted to indicate whether the current demand has been resolved. Use the explanations contained within the application to help you make the appropriate choice.

Supplemental damages are entered in the same manner as Original Damages.

**Note:** When adding a Supplement, enter ONLY the supplemental values. The system will add your supplemental values to the previous demand amount to calculate the new Total Demand Amount.

### — The Supplemental Damages Pane

Supplemental Damages Pane Field Definitions:

- **Auto Damages (Company Paid):** The dollar amount paid by the demanding company to resolve collision or comprehensive coverage.
- **Rental:** The dollar amount for rental and/or loss of use expense that the Demander company paid, not to include the insured's out of pocket, associated with the demand.
- **Towing:** The dollar amount for towing or similar expense associated with the demand.
- **Other Amount:** The dollar amount for other expenses associated with the demand that the Demander company paid, not to include the insured's out of pocket.
- **Deductible (Customer Paid):** The dollar amount that represents the collision or comprehensive deductible associated with the demand.
- **Total Loss / Salvage Amt:** The salvage amount represents the amount recovered or lost in salvage. This field is only filled if the Total Loss checkbox was checked. Normally, the Salvage

Amt value is deducted from the total damages value (thus it is written in red).

**Note:** When adding a Supplement, enter ONLY the supplemental values. The system will add your supplemental values to the previous demand amount to calculate the new Total Demand Amount.

### – The Negotiated Liability Pane

The Responder Liability % is the percentage of liability for this incident that is being assigned to the Responder.

When this value resides in a Demander negotiation action step, it represents the liability % that the Demander thinks the Responder should accept. When this value resides in a Responder negotiation action step, it represents the liability % that the Responder is willing to accept.

The Responder Liability % is used to calculate the total demand or total response. The equation looks like this:

$$\text{Negotiated Liability} \times \text{Negotiated Damages} = \text{Total Demand}$$

### – Negotiation Message Pane

The negotiation message pane shows the message entered by the user that took the action. It should convey the reasoning behind the action being taken. Since the negotiation message is a required field, there should always be a negotiation message for each action.

**SEE ALSO:**

[Counter Offer](#)

[Accept](#)

[Edit Original Damages](#)

[Reopen](#)

[Arbitrate](#)

## 5.1.37 Payment

This action shows payment history and allows you to enter a new payment. Other information includes: reference number, check number, and comment. If you would like to close the demand after you add the payment click next to the check box marked close the demand. When you are finished click **Save**.

**Note:** Check Received Date and Payment Amount are required fields.

### – View Payment History

The Payment History section provides a quick method for viewing any payments that have previously been posted.

Payment History Field Definitions:

- **Total Demand Amount:** The total amount the Demander is expecting to recover from the Responder.

- **Total Payment Amount:** The total amount that the Demander has received from the Responder up to the current date.
- **Outstanding Payment:** The difference between the Total Demand Amount and the Total Payment Amount.

### — Add Payment

The Add Payment section provides the ability to enter the details of a payment made toward a specific demand.

Add Payment Field Definitions:

- **Check Received Date (mm/dd/yyyy):** Required field that indicates the date when the check was received.
- **Payment Amount:** Required field that indicates the amount of the payment received.
- **GL Account Reference:** Used to indicate if payment should be posted to specific account.
- **Check Number:** Reference number of check.
- **Comment:** Used to enter any necessary comment.
- **Close the Demand:** Check to indicate if demand should be closed. Selecting this box opens the Close the Demand section.

### — Close the Demand

The Close the Demand section captures details about the closure of the demand.

Close the Demand Field Definitions:

- **Reason for Close:** Required field used to choose one of the following indicating the reason for the closure:
  - **Void:** Indicates the demand was created in error (i.e. a demand was duplicated).
  - **Other:** Indicates that none of the other choices are appropriate. A detailed comment should be entered if selecting this option.
  - **Arbitration Docket Heard and Closed:** Indicates that the demand was resolved in arbitration and that case has been closed.
  - **Settled:** Indicates that this payment settles the demand.
  - **Denied:** Indicates denial of the demand after payment.

- **Abandoned:** Indicates an abandoned demand after payment.
- **Resolved:** Required field used to indicate if the demand has been resolved. Choose Yes or No as appropriate.
- **Message:** Used to include a message if needed.

**SEE ALSO:**[Add Evidence](#)[Add Message](#)[Close Demand](#)[Edit Damages Worksheet](#)[Edit Demand Detail](#)[Edit Liability Worksheet](#)[Print Demand](#)

### 5.1.38 Close Demand

An E-Subro Hub demand can ONLY be closed by the demanding party. The Auto-Close feature may be activated by the demanding party based on that party's configuration.

**SEE ALSO:**[Add Evidence](#)[Add Message](#)[Add Payment](#)[Edit Damages Worksheet](#)[Edit Demand Detail](#)[Edit Liability Worksheet](#)[Print Demand](#)

### 5.1.39 Reopen / Reopen for Supplement

Occasionally you may need to reopen a demand and E-Subro Hub makes that easy.

#### **Reopening a Demand**

If you need to reopen a demand that has been closed, you may do so by choosing either of the following selections on the action button menu OR under **Manage Demand** in the secondary menu:

- **Reopen for Supplement:** Use this selection if you are reopening the demand specifically to add a supplement. You will be taken to the [Supplement](#) screen.
- **Reopen:** Use this selection if you are opening the demand for any reason other than to add a supplement. You will be asked to add a message and confirm the action by clicking a Reopen button.

**SEE ALSO:**[Counter Offer](#)[Accept](#)[Edit Original Damages](#)[Supplement](#)[Arbitrate](#)

## 5.1.40 Print Demand

Print Demand provides a method for printing all or selected components of the demand. This action is access under the **Manage Demand** menu → **Print Demand** and will create a PDF document of the selected option.

### **Print Options**

Print Options Definitions:

- **Print Full Demand (With All Evidence):** Prints everything associated with the demand including all evidence.
- **Print Full Demand (With Opposing Party Evidence Only):** Prints everything associated with the demand except for the current party's evidence.
- **Print Full Demand (Without Evidence):** Prints everything associated with the demand except its evidence.
- **Print Parts of the Demand:** Requires the selection of one or more of the following.
  - **Demand Details (Detail, Negotiations & Attachment List)**
  - **Attachment Evidence**
  - **Activity Log**

After your selection, click Generate PDF Preview.

**SEE ALSO:**[Add Evidence](#)[Add Message](#)[Add Payment](#)[Close Demand](#)[Edit Damages Worksheet](#)[Edit Demand Detail](#)[Edit Liability Worksheet](#)

### 5.1.41 Batch Printing

The Batch Printing feature of E-Subro Hub provides a method for the creation of PDF based demand packages used to integrate the demand information back into an internal claim system.

The ability to Batch Print is a specific privilege and configuration that must be given by a Security Administrator to an individual user. See Batch Print Administration.

#### – Using Batch Printing

The Batch Printing page displays those demands which have either had an action performed that is defined as one where a print is needed or been manually sent to the batch.

Click **Print Next Batch** to create the next set of PDF's from the available list. The number of PDF files that are generated, as well as the number of demands pulled from the list, are determined by the settings chosen by your administrator.

If you have multiple business units assigned to you, you may add or remove the demands for a particular unit by clicking **Select Business Units**, checking or unchecking the corresponding box in the Enabled column, and clicking **Update** to commit the changes.

You can modify the displayed list by selecting the desired category from the Show Demands drop down list. Click **Refresh** to apply the new selection.

Viewing an individual PDF can be accomplished by clicking the appropriate PDF icon. Viewing the demand in this way will not remove the item from the list of items to be processed.

You may choose the demands to generate by checking the box next to the desired demands and clicking **Print Selected Demands**.

**SEE ALSO:**

[E-Subro Preferences](#)

[Batch Print Admin](#)

### 5.1.42 Edit Liability Worksheet

In a manner very similar to the [Damages Worksheet](#), the Liability Worksheet is provided for internal use and should be completed by the individual appraising damages. The Liability Worksheet can be accessed under the **Worksheets** drop down menu → **Liability Worksheet** → **Edit Liability Worksheet**.

#### – Editing Liability Worksheet

Enter the percentage of responder liability as well as any notes about the change and click **Save** to commit the changes.

**SEE ALSO:**

[Add Evidence](#)

[Add Message](#)

[Add Payment](#)

[Close Demand](#)

[Edit Damages Worksheet](#)

[Edit Demand Detail](#)  
[Print Demand](#)

### 5.1.43 View Liability Worksheet

In a manner very similar to the [Damages Worksheet](#), the Liability Worksheet is provided for internal use and should be completed by the individual appraising damages. The Liability Worksheet can be accessed under the **Worksheets** drop down menu → **Liability Worksheet** → **View Liability Worksheet**.

### 5.1.44 Edit Damages Worksheet

The Damages Worksheet is provided for internal use and should be completed by the individual appraising damages and can be accessed under the **Worksheets** drop down menu → **Damages Worksheet** → **Edit Damages Worksheet**.

#### – Editing Damages Worksheet

The [Original Damages Pane](#) is displayed to provide the details of the demand.

The Appraised Damages Pane provides an editable set of fields that correspond to the [Original Damages Pane](#).

Enter the Appraised Damages in the appropriate fields, enter any notes in the Appraisal Notes fields, and click **Save** to commit the changes.

#### SEE ALSO:

[Add Evidence](#)  
[Add Message](#)  
[Add Payment](#)  
[Close Demand](#)  
[Edit Demand Detail](#)  
[Edit Liability Worksheet](#)  
[Print Demand](#)

### 5.1.45 View Damages Worksheet

The Damages Worksheet is provided for internal use and should be completed by the individual appraising damages and can be accessed under the **Worksheets** drop down menu → **Damages Worksheet** → **View Damages Worksheet**.

## 5.2 Responder Actions

This section covers the actions most often used by the responder.

#### Topics in this section:

1. Negotiate
  - [FNOL](#)
  - [Investigating](#)
  - [Request Information](#)
  - [Reply to a Request](#)
  - [Counter Offer](#)
  - [Accept](#)
  - [Deny](#)
  - [Arbitrate](#)
  - [Acknowledge Demander Acceptance](#)
2. Assign
  - [Assign Demand to User](#)
  - [Assign Demand to Business Unit](#)
  - [Assign Task to User](#)
  - [Assign Task to Business Unit](#)
  - [Take Ownership](#)
3. Manage Demand
  - [Add Evidence](#)
  - [Add Message](#)
  - [Edit Demand Detail](#)
  - [Edit Damages Worksheet](#)
  - [Edit Liability Worksheet](#)
  - [Print Demand](#)
  - [Close Demand](#)
4. Managing Tasks
  - [Task Assigner](#)
  - [Task Assignee](#)

### 5.2.1 FNOL (First Notice Of Loss)

When you mark a demand as FNOL, you are indicating that this is the first time you have been made aware of a loss.

#### **– Marking as FNOL**

When you wish to mark a demand as FNOL, you are required to add a message to document the file. Once this action has been taken on a demand you cannot use this action again on the same demand.

This can be accomplished by choosing the **Negotiate** menu → **FNOL**.

Enter your message and click **Mark as FNOL** to commit the change.

**SEE ALSO:**

[Investigating](#)  
[Print Demand](#)



## 5.2.2 Investigating

When you mark a demand as Investigating, you are indicating that additional time is needed until you are able to continue working the demand.

### – Marking as Investigating

When you wish to mark a demand as Investigating, you are required to add a message to document the file.

This can be accomplished by choosing the *Negotiate* menu → *Investigating*.

Enter your message and click *Mark as Investigating* to commit the change.

#### SEE ALSO:

[FNOL \(First Notice of Loss\)](#)

[Print Demand](#)

## 5.2.3 Request Information

The Request Information feature provides a negotiation action used to request additional information about a demand from the opposing party.

Use Request Information as a method of asking the opposing party for information not included in the demand which you deem necessary to proceed. When using this feature, the Action Flag will be moved to the opposing party to ensure the demand will be displayed on their work list.

### – Issuing a Request for Information

Click *Request Info* on the action button menu OR select *Request Information* from the *Negotiate* drop down menu.

Enter your desired message in the appropriate field specifying what additional information is needed and click *Issue Request for Information*.

Click *Cancel* to return to the previous screen.

**Note:** this action will put an Action Flag to the opposing party.

### – Responding to a Request for Information

Incoming requests can be viewed from within the Action Flag popup, within the Activity Log or in the Demand Detail Tab.

When an incoming request is active and you take a specific action (Edit Details, Add Evidence, Send Message), a popup asks if the action satisfies the Request for Information. The popup will not appear if you add evidence using the AF Client option.

Any action that changes the Action Flag automatically removes the request. For example, a Counter Offer by either party causes the Action Flag to change and thus removes the request.

The request can also be manually cleared from the Action Flag popup.

**SEE ALSO:**[Demand Detail Tab - Adding a Demand](#)[Damages & Liability Tab - Adding a Demand](#)[Evidence Tab - Adding a Demand](#)[Demand Summary Tab - Adding a Demand](#)[Validations and Related Cases - Adding a Demand](#)

## 5.2.4 Reply to a Request

The Reply to a Request functionality allows users to post public or private replies. Replies posted will associate themselves to the current demand in progress.

### — Adding a Reply to a Request

To send a reply, choose the desired link from the **Negotiate > Reply to a Request** menu.

Enter the text of your reply in the text box and click the corresponding Send/Add button to insert the message or note.

**Note:** the Add Message option will be visible to both parties' Activity Log and will put a Message icon on the opposing party's Work List. The Add Internal Note option will not be visible on the opposing party's Activity Log.

When the message is saved it will then display in the Activity Log. Choose the Less Detail option to focus primarily on messages and notes.

**SEE ALSO:**[Add Evidence](#)[Add Payment](#)[Close Demand](#)[Edit Damages Worksheet](#)[Edit Demand Detail](#)[Edit Liability Worksheet](#)[Print Demand](#)

## 5.2.5 Counter Offer

The negotiate section of the action menu bar allows the demander and responder to negotiate on the current demand.

### — Making a Counter Offer

To initiate a counter offer, click **Negotiate** in the secondary menu and choose **Counter Offer** from the drop down list OR click **Counter** from the menu bar.

The counter option brings you to the Damages & Liability tab where you can issue a counter by editing the Negotiated Damages entries and/or the Liability entry.

The user can enter a specific amount in the Total Demand entry and override the automated calculations. The Negotiation Message is a required field so a message must be entered.

When you have entered the appropriate details and completed the required Negotiation Message, click **Issue Counter**, **Issue Counter & Upload Evidence**, or **Cancel**.

**Note:** this action will put an Action Flag to the opposing party.

**SEE ALSO:**

[Accept](#)

[Edit Original Damages](#)

[Supplement](#)

[Reopen](#)

[Arbitrate](#)

## 5.2.6 Accept

The Accept action is used to tell the other party that you will accept their most recent offer.

### — Accepting an Offer

1. To initiate the Accept action, click **Accept** in the action button menu OR open the demand and click **Negotiate > Accept**.

**Note:** the Accept menu item will only be available from the demand side once the other party has made a counter offer.

2. To complete the Accept action, click the **Accept** button. The Negotiation Message is not a required field but a note can be added if appropriate.
3. Upon completion, E-Subro Hub will tell you that the Accept action was completed.

**Note:** In the current system configuration, clicking "Accept" confirms you are accepting Liability AND Damages at the current negotiation and this action will be a matter of record in the demand activity log. Should arbitration be filed to recover an additional balance, record of having accepted an offer can be submitted as evidence.

**SEE ALSO:**

[Counter Offer](#)

[Edit Original Damages](#)

[Supplement](#)

[Reopen](#)

[Arbitrate](#)

## 5.2.7 Deny

The Responder can choose to deny the demand. This action communicates to the Demander that you are unwilling to accept liability for the incident (Responder Liability is set to 0%), and that you are unwilling to pay anything on this demand (Total Response is set to \$0.00).

### – Denying an Offer

For communication reasons, its best to choose a Reason for Denial.

A Negotiation Message is required on the Deny action.

After making the appropriate selection and entering a message, click **Deny** to commit the action.

**Note:** this action will put an Action Flag to the opposing party.

**SEE ALSO:**

[Counter Offer](#)

[Accept](#)

## 5.2.8 Arbitrate

The process of sending a demand to arbitration has been greatly eased by E-Subro Hub.

### – Sending a Demand to Arbitration

If you find that you can not reach an agreement about a particular demand, you can easily send that demand to arbitration by selecting Arbitrate from under **Negotiate** in the secondary menu.

All of the information in the demand will be automatically transferred into the new Arbitration case.

**SEE ALSO:**

[Counter Offer](#)

[Accept](#)

[Edit Original Damages](#)

[Supplement](#)

[Reopen](#)

## 5.2.9 Acknowledge Demander Acceptance

The Demander accepted your offer, causing an action flag to appear on your Work List. The Demand remains on your Work List to show that you've come to an agreement. Selecting the Acknowledge Demander Acceptance link on the action flag will remove the Demand from your Work List.

## 5.2.10 Edit Original Damages

This option brings the user to an editable Original Damages pane.

The Damages & Liability tab includes the Original Damages pane that acts as an input calculator for calculations to be displayed in the other panes. For example, amounts will be entered under each category in the Original Damages and redisplayed in the Negotiated Liability and Total Demands pane.

It should only be necessary to edit the original damages if an entry was incorrectly entered or an item was omitted at the time of entry.

### – The Original Damages Pane

The Original Damages are the actual amounts paid out by a demander to their insured for a specific claim.

The Demander can make changes to the original damages using the [Edit Original Damages](#) action or by adding a [Supplement](#) to a demand that is not yet resolved. In that case, the supplement is treated like an edit to original damages and the modifications are applied to the Original Damages pane.

Original Damages Pane Field Definitions:

- **Auto Damages (Company Paid):** The dollar amount paid by the demanding company to resolve collision or comprehensive (OTC) coverage.
- **Rental:** The dollar amount for rental expense, paid by the demanding company, associated with the demand.
- **Towing:** The dollar amount for towing or similar expense associated with the demand.
- **Other Amount:** The dollar amount for other expenses associated with the demand but not the insured's out of pocket.
- **Deductible (Customer Paid):** The dollar amount that represents the collision or comprehensive deductible associated with the demand.
- **Total Loss / Salvage Amt:** The salvage amount represents the amount recovered or lost in salvage. This field is only filled if the Total Loss checkbox was checked. Normally, the Salvage Amt value is deducted from the total damages value (thus it is written in red).

### – The Negotiated Liability Pane

The Responder Liability % is the percentage of liability for this incident that is being assigned to the Responder.

When this value resides in a Demander negotiation action step, it represents the liability % that the Demander thinks the Responder should accept. When this value resides in a Responder negotiation action step, it represents the liability % that the Responder is willing to accept.

The Responder Liability % is used to calculate the total demand or total response. The equation looks like this:

$$\text{Negotiated Liability} \times \text{Negotiated Damages} = \text{Total Demand}$$

### – Negotiation Message Pane

The negotiation message pane shows the message entered by the user that took the action. It should convey the reasoning behind the action being taken. Since the negotiation message is a required field, there should always be a negotiation message for each action.

**SEE ALSO:**

[Counter Offer](#)  
[Accept](#)

[Supplement](#)  
[Reopen](#)  
[Arbitrate](#)

### 5.2.11 Edit Demand Detail

While viewing a demand, you can be transferred to the edit demand mode by clicking the Edit Detail link located in the upper right corner of the Demand Detail tab. This button converts viewable fields into editable fields. This same action can be accessed from the **Manage Demand** menu → **Edit Demand Details**.

Click **Save** to commit any changes.

#### – Demander Company Information

Demander Company Information Field Definitions:

- **Company Name:** Required field which contains a list of pre-filled subsidiary names within the drop down menu from which the appropriate name can be chosen.
- **Claim/Policy Number:** Required field used to enter the Demander's claim or policy number. When adding a new demand, the entry in this field will be used to search the database for demands that have been created with this number. If a demand is found, you will be given the option of creating a companion or counter demand depending on your role.
- **Line of Insurance:** Used to define a choice between personal or commercial insurance. The choice made here impacts what is seen in the following field.
- **Ins. First/Last Name** (Shown if Personal Line of Insurance is chosen): Used to enter the first and last name of the Demander's insured individual. The Last Name is a required field.
- **Driver** (Checkbox shown if Personal Line of Insurance is chosen): Used to indicate if the Demander's insured was driving the vehicle at the time of the accident. If this box is checked, the Driver First/Last Name field located under Demander Vehicle information will automatically populate with the phrase "Same as Insured".
- **Ins. Company Name** (Shown if Commercial Line of Insurance is chosen): Required field used to enter the name of the insured company.

#### – Responder Company Information

Responder Company Information Field Definitions:

- **Company Name:** Required field that is populated via a search process which begins by clicking the Select button. Partial entries of at least 3 characters can be used as search terms. The selection is made by clicking the desired company code from the search results.
- **Claim/Policy Number:** Used to enter the Responder's claim or policy number. The Claim/Policy Number field OR the Last Name (Company Name) is a required field.

- **Line of Insurance:** Used to define a choice between personal or commercial insurance. The choice made here impacts what is seen in the following field.
- **Ins. First/Last Name** (Shown if Personal Line of Insurance is chosen): Used to enter the first and last name of the Responder's insured individual. The Last Name OR the Claim/Policy Number field is a required field.
- **Driver** (Checkbox shown if Personal Line of Insurance is chosen): Used to indicate if the Responder's insured was driving the vehicle at the time of the accident. If this box is checked, the Driver First/Last Name field located under Responder Vehicle information will automatically populate with the phrase "Same as Insured".
- **Ins. Company Name** (Shown if Commercial Line of Insurance is chosen): Used to enter the name of the insured company. The Company Name OR the Claim/Policy Number field is a required field.

### — Demander Vehicle Information

Demander Company Information Field Definitions:

- **Driver First/Last Name:** Used to enter the first and last name of the individual who was driving at the time of the accident if other than the insured. The phrase "Same as Insured" will automatically populate in this field if the Driver checkbox located under Demander Company Information is checked.
- **Bailment:** Used to indicate if the Demand involves a bailment situation.

**Note:** Bailment is the process of placing personal property or goods in the temporary custody or control of another with the expectation of the return of the property (such as in the case of giving one's car to a parking attendant or service professional). Some states have special requirements that could impact demands when a bailment is involved which is the reason this checkbox is provided. Typically, if you are unaware of why this checkbox would need to be used, you most likely will not need to use it.

- **Vehicle Year:** Used to enter the model year of the automobile about which the demand has been created.
- **Vehicle Make/Model:** Used to enter the manufacturer's brand and model of the automobile about which the demand has been created.
- **Lic. Plate State/Number:** Used to enter the state and number of the vehicle license plate.

### — Responder Vehicle Information

Responder Company Information Field Definitions:

- **Driver First/Last Name:** Used to enter the first and last name of the individual who was driving

at the time of the accident if other than the insured. The phrase "Same as Insured" will automatically populate in this field if the Driver checkbox located under Responder Company Information is checked.

- **Vehicle Year:** Used to enter the model year of the automobile about which the demand has been created.
- **Vehicle Make/Model:** Used to enter the manufacturer's brand and model of the automobile about which the demand has been created.
- **Lic. Plate State/Number:** Used to enter the state and number of the vehicle license plate.

### — Loss Information

Loss Information Field Definitions:

- **Loss Date (mm/dd/yyyy):** Required field used to enter the date of the loss. This can be entered manually or by clicking **Select** and choosing the date from the calendar.
- **Loss City:** Used to enter the city in which the loss occurred.
- **Loss Location (e.g. street):** Used to enter the street address where the loss occurred.
- **Loss State:** Required field used to select the state in which the loss occurred.
- **Loss Facts (Demander):** Used to include any relevant facts pertaining to the demand.

### — Demander Rep Information

**Note:** The Demander Rep Information prefills from the logged in user's profile.

Demander Rep Information Field Definitions:

- **Contact Name:** Contains the Demander Rep name.
- **Address 1:** Contains the Demander Rep street address.
- **Address 2:** Contains the Demander Rep street address.
- **City/State/Zip:** Contains the Demander Rep city, state, and zip code.
- **Phone:** Contains the Demander Rep phone number.

### — Responder Rep Information

**Note:** These fields are optional. The Responder Rep Information changes automatically with each



ownership change.

Responder Rep Information Field Definitions:

- **Contact Name:** Will contain the name associated with the user account that currently owns the Demand on the Responder side.
- **Address 1:** Will contain the street address associated with the user account that currently owns the Demand on the Responder side.
- **Address 2:** Will contain the street address associated with the user account that currently owns the Demand on the Responder side.
- **City/State/Zip:** Will contain the city, state, and zip code associated with the user account that currently owns the Demand on the Responder side.
- **Phone:** Will contain the phone number associated with the user account that currently owns the Demand on the Responder side.

## — Remittance Information

**Note:** On the first demand a user creates, these fields will be blank. Once they are completed, they will be prefilled in subsequently added demands.

In order to change current remittance information, simply change these fields while adding a new demand.

Remittance Information Field Definitions:

- **Remit payment to:** Contains a list of pre-filled names within the drop down menu from which the appropriate name can be chosen.
- **Address 1:** Contains the street address where Demand amount should be mailed.
- **Address 2:** Contains the street address where Demand amount should be mailed.
- **Attention:** Contains the contact name to whom the Demand amount should be mailed.
- **City/State/Zip:** Contains the city, state, and zip code where Demand amount should be mailed.
- **Phone:** Contains the phone number to be used for remittance questions.

**SEE ALSO:**

[Add Evidence](#)

[Add Message](#)

[Add Payment](#)

[Close Demand](#)

[Edit Damages Worksheet](#)

[Edit Liability Worksheet](#)

[Print Demand](#)

## 5.2.12 Add Evidence

The E-Subro Hub allows users to add evidence directly to a demand. This can be external evidence used to make a case for re-payment, or it can be internal evidence that is only to be seen by members of your own company.

### Note:

- Evidence cannot be deleted after the demand has been issued. Once evidence has been added and the demand issued, the E-Subro Hub will not let you delete it. This is to prevent disputes about what evidence might or might not have been present at certain times during the demand process. If the demand has not yet been issued, you can delete evidence.
- The Viewable by Other Parties choice is irreversible in the Public status. When adding evidence, you may add evidence to be seen by your party only, the Private status. To do so you must uncheck the “Viewable by Other Parties” check box. This choice can be changed after the initial save of the evidence item, to make the evidence viewable by the other party. Once in the Public status, evidence cannot be changed to the Private status.

### – Adding Evidence

Adding Evidence can be accomplished using one of several methods.

From the Evidence tab, click the Add a Document link (upper right hand corner) to open an Add a Document pop-up. You may open up to ten Add a Document pop-ups to complete the addition of multiple evidence items at one time.

Or, choose **Manage Demand > Add Evidence** from the secondary menu.

Evidence can also be added by choosing **Issue Counter & Upload Evidence** in the Counter Offer function.

### – Evidence Type / Evidence Types Contained

Choose the appropriate evidence types under the section labeled Choose All Evidence Types That This Document Contains.

Examples include a .jpg file with a single photograph, a .doc (word doc) containing both the Estimate and three scene photographs, or perhaps a .pdf file containing all pertinent evidence for the case. Clicking all types that apply helps you (and the other party) find the evidence more quickly and easily once its been added.

See Supported File Types in this topic for additional information.

Once you have chosen the Evidence Types by clicking the corresponding icon, a line item will be displayed under Evidence Types Contained in this Document.

You may add an optional description in the provided field or remove the item using the Remove icon to the right of the line item.

The evidence can be submitted individually or as a bundle. In other words, you can select one type of evidence related to a single document, or you can select multiple types if the single document contains those items in one file.

## – Submit Method

The Submit Method provides a choice about you get the information into E-Subro Hub. The following describes each method:

- **Upload:** A direct upload of the Evidence file from your system to E-Subro Hub. If you have direct access to the evidence as a file (like a .doc or a .jpg file) this is the easiest and fastest way to add evidence.

To use this method, choose **Upload** under Submit Method and then click the **Browse** button (far right) to select the file (from your computer's file system) to be uploaded.

**Note:** the Upload method is similar to attaching a document to an e-mail.

- **Fax:** Send your evidence items via a fax machine.

Select the appropriate evidence types to indicate what you'll be sending, then click **Save Evidence**. E-Subro Hub provides a bar coded cover sheet for use with the faxed document(s). The bar code contains information about the demand and the evidence including where to place the documents so they can be viewed in the evidence tab. The fax option should not be used for photos as the fax quality usually doesn't transmit enough detail to end up with a clear photo.

## – Browse for File to Upload

If upload is the chosen submission method, use the **Browse** button to find the file to upload from within your computer's file directory.

Browse to the appropriate folder within your directory, choose the file and click the **Open** button at the bottom right of the Choose File popup.

Note that the chosen file (with file path) is automatically populated in the File field.

**Note:** the Upload method is similar to attaching a document to an e-mail.

## – Evidence Types Contained in this Document

This field is populated with the Types chosen earlier in the process. The description text may be entered by clicking in the field and typing the desired text.

## – Viewable by other parties

The last decision to make about adding this piece of evidence is whether to make the evidence viewable by other parties or not.

Caution is advised regarding this choice as once an evidence item is saved as viewable by other parties, this setting is locked and cannot be changed. If the evidence item is saved as NOT viewable by other parties, it can be made viewable any time during the negotiations and will then be locked in the viewable status.

- **Checked:** By checking the box (default), the evidence will be viewable to the other party in this demand (for instance, if you're the demander, this checkbox allows the responder to see the evidence item)
- **Unchecked:** If you uncheck the box, only your party (ie. your company) will be able to see the item.

### — Save Evidence

To complete the process click the **Save Evidence** button. If any data issues exist, they will have to be corrected in order to proceed. Issue messages will be shown in red (near the pop-up where the problem exists).

Once the evidence has been saved a message will appear in the top left corner stating that it was saved successfully.

### — AFClient

The AFClient software provides an easy alternative method for attaching claim related documents and evidence to a demand within E-Subro Hub.

It consists of two components: AFPrint and AFScan.

For additional information about this topic, see the [AFClient User Guide](#).

### — Status

The Status column provides a quick method for understanding what's happening with the associated demand.

Status type definitions:

- **Pending:** The evidence item is received but processing is ongoing. An item is not viewable while the status is Pending.
- **Not Received:** The evidence item has not yet been received by E-Subro Hub. This usually occurs when the evidence item was added via the Fax method, and the fax transmission has not yet been received and processed.
- **Available:** The evidence item is in E-Subro Hub. The View link should be active, allowing users to see the stored item.
- **Error:** The system is trying to process the evidence item but is having a problem. When an item is in the Error status it will be retried for a certain number of times. If the error status cannot be resolved it will move to the Failed status. When the item is in Error status click the Error link for more information about the error.
- **Failed:** The system attempted to process the evidence item but could not. When the item is in Failed status click the Failed link for more information. One common cause of failure is the use of

an unsupported file type. See Supported File Types in this topic for additional information.

## — Supported File Types

E-Subro Hub only supports certain file types for upload.

A file type is the 3 or 4 letter extension at the end of each filename. For instance, for the picture file Picture1.jpg, the .jpg is the file type.

If you try to upload a file with an unsupported file type into E-Subro Hub, it will fail and the document will not be viewable. Below is a list of supported file types:

- .bmp
- .doc
- .gif
- .jff
- .jpe
- .jpeg
- .jpg
- .pdf
- .png
- .pps
- .ppt
- .rtf
- .tif
- .tiff
- .txt
- .xls
- .xlw

## — Completing Fax Evidence Submissions

When you choose to submit the evidence via Fax, the submission does not end with the click of the Save Evidence button. You must also complete the final step of sending the fax.

Print the cover sheet for the Fax items. Note that the cover sheet link appears on the right side of the screen, under the Actions column.

The bar code on the cover sheet tells the E-Subro Hub where to place the documents behind it.

Steps to complete the submission:

1. Print the cover sheet
2. Place the cover sheet on the top of the evidence item you're faxing. Each evidence item requires a separate cover sheet. For example, if three items in the evidence tab have cover sheets, you must print all three of the cover sheets and place them on top of the corresponding evidence item. This is the only way the system will know where to place your item (so you can find it and view it). If faxed evidence will be submitted at one time, the user can choose to select several evidence types for a single cover sheet.
3. Place the evidence package into your fax machine and send it to the number on the Fax cover sheet: (813) 889-4060

### SEE ALSO:

[Add Message](#)

[Add Payment](#)

[Close Demand](#)

[Edit Damages Worksheet](#)

[Edit Demand Detail](#)

[Edit Liability Worksheet](#)

[Print Demand](#)

### 5.2.13 Add Internal Note

The add internal note function will create a note that will only be seen by users from your company or an authorized representative. This note will not be seen by the opposing party.

### 5.2.14 Send FYI

Provides Demanders and Responders a method to send an information-only message to the other party that requires no response. The Action Flag status will remain unchanged.

### 5.2.15 Diaries


The Diary is used to suppress an Action Flag in an attempt to remove the demand from [My Work List](#) for a specified period of time.

Diaries are associated with a specific demand rather than a specific user. This means that any diaries which are set for a given demand will stay with that demand even if the ownership changes.

**Note:** This will remove it from [My Work List](#) as long as no other factors exist that would keep it on the list. These factors include: (a) A Message Flag is present or, (b) You have an unfinished task assigned to you.

## – Set Diary


The Set Diary action can be invoked:

1. From any Demand List by clicking the  icon and then choosing the **Set Diary** link.
2. From an Action Flag on the Demand List or within the demand.

Once you've chosen the Set Diary action and the Set Diary popup appears:

1. Enter the number of days before the Diary expires in the Expires In column.


OR

2. Enter the date you wish the Diary to expire by selecting it from the Calendar ().
3. Add a comment that will remind you why a diary was set. (The more specific you are here, the less time you'll spend trying to figure out what your next step is when the Diary expires and the demand returns to My Work List).
4. Click the **Set Diary** button to complete the action

A grey flag will appear in the demand, representing the Diary.


## – Set a New Diary

When you want to remove an existing diary and create a new one immediately, use the Set New Diary feature to do it all in one action.

The Set New Diary action can be invoked from within an Action Flag on the Demand List or a Demand by clicking the Diary Flag  and then choosing the Set New Diary link or from the **Manage Demand** menu → **Set New Diary**. This can be done for an active diary or an expired diary.


## – Cancel Diary

When you want to remove an existing diary, use the Cancel Diary feature.

The Cancel Diary action can be invoked from within an Action Flag on the Demand List or a Demand by clicking the Diary Flag  and then choosing the Cancel Diary link or from the **Manage Demand** menu → **Cancel Diary**.

## – Dismiss Expired Diary

When a diary has expired, it will either "unsuppress" the Action Flag or create a new Action Flag that exists only because the diary expired. Either way a red Action Flag will remain on your demand. If you want to remove the demand from your Work List, and the Action Flag only exists due to the expired diary, use the Dismiss Expired Diary link to accomplish your goal.

The Dismiss Expired Diary action can be invoked from the Demand List or within a Demand by clicking the Action Flag  and then choosing the Dismiss Expired Diary link.

### Automatic Diaries

Automatic Diaries are diaries that get set automatically when a certain event occurs in E-Subro Hub. Currently, there are two events which trigger Automatic Diaries.

1. **Issue Demand:** When a demand is Issued, an Automatic Diary is created on the demand. The number of days is set by Company configuration. The diary is associated with the demand for which it is created and will move with the demand if the demand is assigned to another user.
2. **Acceptance:** When a demand is accepted (by the Demander or the Responder) an Automatic Diary is created for the Demander. The number of days is set by Company configuration. This removes the demand from the Demander's My Work List while awaiting payment, unless "Auto Close" is configured, but also prevents the demand from being forgotten.

**SEE ALSO:**

[My Work List](#)

[Other Preset Demand Lists](#)

[Custom Demand Lists](#)

[Demand List Icons](#)

[Search for a Demand](#)

## 5.2.16 Companion Demand

Creating a companion demand eases the data entry burden associated with creating a new demand by copying some of the demand information from an existing demand.

### Adding a Companion Demand

A companion demand is created by selecting **Create Companion Demand** from the **Manage Demand** drop down menu.

The creation of a Companion Demand prefills some information from the original demand into the appropriate locations in the new demand. From this point the demand can be processed like any new demand.

For a Companion Demand, only the Demander Company Information, Demander Vehicle Information, and the Loss Information will be prefilled.

Only your party's evidence will be copied from the original demand based on the availability of the evidence. Your evidence will be copied into the new demand if it is both available in the system and not marked as obsolete. Items that were marked private in the original demand will remain private in the new demand.

**SEE ALSO:**

[Demand Creation](#)

[Demand Detail Tab - Adding a Demand](#)

[Damages & Liability Tab - Adding a Demand](#)



[Evidence Tab - Adding a Demand](#)  
[Demand Summary Tab - Adding a Demand](#)  
[Validations and Related Cases - Adding a Demand](#)

## 5.2.17 Create Counter Demand

Creating a counter demand eases the data entry burden associated with creating a new demand by copying some of the demand information from an existing demand.

### – Create Counter Demand

From an incoming demand, the Responder can easily create a Counter Demand by selecting **Create Counter Demand** from the **Manage Demand** drop down menu.

When creating a counter demand, evidence and information from the original demand is prefilled in the new demand in the appropriate locations.

Demander and Responder Company Information will be prefilled as appropriate for the new demand as will the Demander and Responder Vehicle Information and the Loss Information. You will be required to select the appropriate Subsidiary for your company's information at which point you can proceed with the demand creation in the same manner as you would when creating a new demand.

Only your party's evidence will be copied from the original demand based on the availability of the evidence. Simply stated, your evidence will be copied into the new demand if it is both available in the system and not marked as obsolete. Items that were marked private in the original demand will remain private in the new demand.

#### SEE ALSO:

[Demand Creation](#)  
[Demand Detail Tab - Adding a Demand](#)  
[Damages & Liability Tab - Adding a Demand](#)  
[Evidence Tab - Adding a Demand](#)  
[Demand Summary Tab - Adding a Demand](#)  
[Validations and Related Cases - Adding a Demand](#)

## 5.2.18 Supplement

The supplement action allows you to enter supplemental damages into the current demand.

### – Entering Supplemental Damages

To enter Supplemental Damages, click **Supplement** from the action button menu OR choose **Manage Demand > Supplement** from the secondary menu.

You will be prompted to indicate whether the current demand has been resolved. Use the explanations contained within the application to help you make the appropriate choice.

Supplemental damages are entered in the same manner as Original Damages.

**Note:** When adding a Supplement, enter ONLY the supplemental values. The system will add your supplemental values to the previous demand amount to calculate the new Total Demand Amount.

## — The Supplemental Damages Pane

Supplemental Damages Pane Field Definitions:

- **Auto Damages (Company Paid):** The dollar amount paid by the demanding company to resolve collision or comprehensive coverage.
- **Rental:** The dollar amount for rental and/or loss of use expense that the Demander company paid, not to include the insured's out of pocket, associated with the demand.
- **Towing:** The dollar amount for towing or similar expense associated with the demand.
- **Other Amount:** The dollar amount for other expenses associated with the demand that the Demander company paid, not to include the insured's out of pocket.
- **Deductible (Customer Paid):** The dollar amount that represents the collision or comprehensive deductible associated with the demand.
- **Total Loss / Salvage Amt:** The salvage amount represents the amount recovered or lost in salvage. This field is only filled if the Total Loss checkbox was checked. Normally, the Salvage Amt value is deducted from the total damages value (thus it is written in red).

**Note:** When adding a Supplement, enter ONLY the supplemental values. The system will add your supplemental values to the previous demand amount to calculate the new Total Demand Amount.

## — The Negotiated Liability Pane

The Responder Liability % is the percentage of liability for this incident that is being assigned to the Responder.

When this value resides in a Demander negotiation action step, it represents the liability % that the Demander thinks the Responder should accept. When this value resides in a Responder negotiation action step, it represents the liability % that the Responder is willing to accept.

The Responder Liability % is used to calculate the total demand or total response. The equation looks like this:

$$\text{Negotiated Liability} \times \text{Negotiated Damages} = \text{Total Demand}$$

## — Negotiation Message Pane

The negotiation message pane shows the message entered by the user that took the action. It should convey the reasoning behind the action being taken. Since the negotiation message is a required field, there should always be a negotiation message for each action.

**SEE ALSO:**

[Counter Offer](#)

[Accept](#)

[Edit Original Damages](#)

[Reopen](#)

[Arbitrate](#)

## 5.2.19 Payment

This action shows payment history and allows you to enter a new payment. Other information includes: reference number, check number, and comment. If you would like to close the demand after you add the payment click next to the check box marked close the demand. When you are finished click **Save**.

**Note:** Check Received Date and Payment Amount are required fields.

### – View Payment History

The Payment History section provides a quick method for viewing any payments that have previously been posted.

Payment History Field Definitions:

- **Total Demand Amount:** The total amount the Demander is expecting to recover from the Responder.
- **Total Payment Amount:** The total amount that the Demander has received from the Responder up to the current date.
- **Outstanding Payment:** The difference between the Total Demand Amount and the Total Payment Amount.

### – Add Payment

The Add Payment section provides the ability to enter the details of a payment made toward a specific demand.

Add Payment Field Definitions:

- **Check Received Date (mm/dd/yyyy):** Required field that indicates the date when the check was received.
- **Payment Amount:** Required field that indicates the amount of the payment received.
- **GL Account Reference:** Used to indicate if payment should be posted to specific account.
- **Check Number:** Reference number of check.
- **Comment:** Used to enter any necessary comment.
- **Close the Demand:** Check to indicate if demand should be closed. Selecting this box opens the Close the Demand section.

### – Close the Demand

The Close the Demand section captures details about the closure of the demand.

Close the Demand Field Definitions:

- **Reason for Close:** Required field used to choose one of the following indicating the reason for the closure:
  - **Void:** Indicates the demand was created in error (i.e. a demand was duplicated).
  - **Other:** Indicates that none of the other choices are appropriate. A detailed comment should be entered if selecting this option.
  - **Arbitration Docket Heard and Closed:** Indicates that the demand was resolved in arbitration and that case has been closed.
  - **Settled:** Indicates that this payment settles the demand.
  - **Denied:** Indicates denial of the demand after payment.
  - **Abandoned:** Indicates an abandoned demand after payment.
- **Resolved:** Required field used to indicate if the demand has been resolved. Choose Yes or No as appropriate.
- **Message:** Used to include a message if needed.

**SEE ALSO:**

[Add Evidence](#)

[Add Message](#)

[Close Demand](#)

[Edit Damages Worksheet](#)

[Edit Demand Detail](#)

[Edit Liability Worksheet](#)

[Print Demand](#)

## 5.2.20 Reopen / Reopen for Supplement

Occasionally you may need to reopen a demand and E-Subro Hub makes that easy.

### **Reopening a Demand**

If you need to reopen a demand that has been closed, you may do so by choosing either of the following selections on the action button menu OR under **Manage Demand** in the secondary menu:

- **Reopen for Supplement:** Use this selection if you are reopening the demand specifically to add a supplement. You will be taken to the [Supplement](#) screen.

- **Reopen:** Use this selection if you are opening the demand for any reason other than to add a supplement. You will be asked to add a message and confirm the action by clicking a Reopen button.

**SEE ALSO:**

[Counter Offer](#)

[Accept](#)

[Edit Original Damages](#)

[Supplement](#)

[Arbitrate](#)

## 5.2.21 Print Demand

Print Demand provides a method for printing all or selected components of the demand. This action is access under the **Manage Demand** menu → **Print Demand** and will create a PDF document of the selected option.

### – Print Options

Print Options Definitions:

- **Print Full Demand (With All Evidence):** Prints everything associated with the demand including all evidence.
- **Print Full Demand (With Opposing Party Evidence Only):** Prints everything associated with the demand except for the current party's evidence.
- **Print Full Demand (Without Evidence):** Prints everything associated with the demand except its evidence.
- **Print Parts of the Demand:** Requires the selection of one or more of the following.
  - **Demand Details (Detail, Negotiations & Attachment List)**
  - **Attachment Evidence**
  - **Activity Log**

After your selection, click Generate PDF Preview.

**SEE ALSO:**

[Add Evidence](#)

[Add Message](#)

[Add Payment](#)

[Close Demand](#)

[Edit Damages Worksheet](#)

[Edit Demand Detail](#)

[Edit Liability Worksheet](#)

## 5.2.22 Batch Printing

The Batch Printing feature of E-Subro Hub provides a method for the creation of PDF based demand packages used to integrate the demand information back into an internal claim system.

The ability to Batch Print is a specific privilege and configuration that must be given by a Security Administrator to an individual user. See Batch Print Administration.

### – Using Batch Printing

The Batch Printing page displays those demands which have either had an action performed that is defined as one where a print is needed or been manually sent to the batch.

Click **Print Next Batch** to create the next set of PDF's from the available list. The number of PDF files that are generated, as well as the number of demands pulled from the list, are determined by the settings chosen by your administrator.

If you have multiple business units assigned to you, you may add or remove the demands for a particular unit by clicking **Select Business Units**, checking or unchecking the corresponding box in the Enabled column, and clicking **Update** to commit the changes.

You can modify the displayed list by selecting the desired category from the Show Demands drop down list. Click **Refresh** to apply the new selection.

Viewing an individual PDF can be accomplished by clicking the appropriate PDF icon. Viewing the demand in this way will not remove the item from the list of items to be processed.

You may choose the demands to generate by checking the box next to the desired demands and clicking **Print Selected Demands**.

#### SEE ALSO:

[E-Subro Preferences](#)

[Batch Print Admin](#)

## 5.2.23 Quick Assign

The Quick Assign feature provides a fast and easy method of assigning individual demands. This feature will be very useful for assigning multiple demands in sequence such as would be done by a router. The ability to Quick Assign is a specific privilege that must be given by a Security Administrator to an individual user.

### – Using Quick Assign

Choose **Quick Assign** from the top level AF menu.

The top of the screen provides a summary of the next demand to be assigned. The bottom of the screen allows you to search for and select the user or Business Unit to which the demand will be assigned.

You can Skip a demand. When skipped, the demand will not appear within Quick Assign again until

you log out of the AF site.

Open this Demand will allow the user to access demands for additional review and actions.

Print this Demand will allow the user to create a PDF copy of the demand.

Back to List will allow the user to access the My Work List.

**SEE ALSO:**

[Assign Demand to User](#)

[Assign Demand to Business Unit](#)

[Assign Task to User](#)

[Assign Task to Business Unit](#)

[Take Ownership](#)

## 5.2.24 Assign Demand to User

The assign portion of the action menu bar provides essential commands that can be performed on the current demand.

**Note:** If the user's role includes routing initial demands, Quick Assign is a specialized privilege that will allow access to the demand assignment actions under the E-Subro menu → Quick Assign.

### – User Search

You begin the assignment by entering the user search criteria.

- **Last Name, First Name:** Enter the name of the individual you are searching for.
- **Email:** If you know the individual's email, you may enter it here.
- **City, State:** The geographic location may help narrow the list of individuals you are searching through.
- **ZIP:** Address related information.
- **Company User ID:** If you know the individual's User ID, you may enter it here.

After you finish entering the criteria, click Search Profiles. From the list generated you will be able to select a user. If you leave all the fields empty and click Search Profiles then all users will be displayed in a list format.

Locate the desired user and click the Assign to User button next to the user you would like to assign to.

### – Completing Assignment

A complete assignment window pops up providing the following options:

- **Comment (optional):** Provides an optional method for entering a message to the assignee.
- **Complete:** Completes the assignment and confirms the assignment of the user.
- **Cancel:** This button brings you back to the list of users where you can make an alternate selection.

**SEE ALSO:**[Assign Demand to Business Unit](#)[Assign Demand to TPA](#)[Assign Task to User](#)[Assign Task to Business Unit](#)[Take Ownership](#)

## 5.2.25 Assign Demand to Business Unit

This action allows you to assign a demand directly to a Business Unit.

### – Search/Select Business Units

Upon entering this action a list of Business Units will appear.

To narrow the list of Business Units displayed, enter a portion of the Business Unit name in the search field and click **Search Business Units**.

Locate the desired Business Unit and click the **Assign to Unit** button next to the Business Unit to which you would like to assign.

### – Completing Assignment

A complete assignment window pops up providing the following options:

- **Comment (optional):** Provides an optional method for entering a message to the assignee.
- **Complete:** Completes the assignment and confirms the assignment of the user.
- **Cancel:** This button brings you back to the list of users where you can make an alternate selection.

**SEE ALSO:**[Assign Demand to User](#)[Assign Task to User](#)[Assign Task to Business Unit](#)[Take Ownership](#)



## 5.2.26 Assign Demand to TPA

- Select Assign
- Select Assign to TPA
- Enter TPA name
- Enter TPA Business Unit name
- Select Complete

### SEE ALSO:

[Assign Demand to User](#)

[Assign Task to User](#)

[Assign Task to Business Unit](#)

[Take Ownership](#)

## 5.2.27 Reassign Demand from TPA to Member

This action allows you to reassign a demand directly from a TPA to a Client Business Unit.

### – Search/Select Client Business Unit

Upon entering this action a list of Client Business Units will appear.

Enter a portion of the Business Unit name in the search field and click **Search Business Units**.

Locate the desired Business Unit and click the **Assign to Unit** button next to the Client Business Unit to which you would like to assign.

### – Completing Assignment

A complete assignment window pops up providing the following options:

- **Comment (optional):** Provides an optional method for entering a message to the assignee.
- **Complete:** Completes the assignment and confirms the assignment of the user.
- **Cancel:** This button brings you back to the list of users where you can make an alternate selection.

### SEE ALSO:

[Assign Demand to User](#)

[Assign Task to User](#)

[Assign Task to Business Unit](#)

[Take Ownership](#)

## 5.2.28 Assign Demand to Client

This action allows you to assign a demand directly to a Business Unit.

### – Search/Select Client Business Unit

Upon entering this action a list of Client Business Units will appear.

Enter a portion of the Business Unit name in the search field and click **Search Business Units**.

Locate the desired Business Unit and click the **Assign to Unit** button next to the Client Business Unit to which you would like to assign.

### – Completing Assignment

A complete assignment window pops up providing the following options:

- **Comment (optional):** Provides an optional method for entering a message to the assignee.
- **Complete:** Completes the assignment and confirms the assignment of the user.
- **Cancel:** This button brings you back to the list of users where you can make an alternate selection.

#### SEE ALSO:

[Assign Demand to User](#)

[Assign Task to User](#)

[Assign Task to Business Unit](#)

[Take Ownership](#)

## 5.2.29 Assign Task to User

You can assign a task by choosing the applicable task for the user and by filling out the user search section.

Begin by selecting a task from the drop down menu.

### – User Search

You begin the assignment by entering the user search criteria.

- **Last Name, First Name:** Enter the name of the individual you are searching for.
- **Email:** If you know the individual's email, you may enter it here.
- **City, State:** The geographic location may help narrow the list of individuals you are searching through.
- **ZIP:** Address related information.

- **Company User ID:** If you know the individual's User ID, you may enter it here.

After you finish entering the criteria, click Search Profiles. From the list generated you will be able to select a user. If you leave all the fields empty and click Search Profiles then all users will be displayed in a list format.

Locate the desired user and click the Assign to User button next to the user you would like to assign to.

### – Confirm Task Assignment

Once you click assign to user a confirm assignment of task to user is displayed. This is simply to confirm the name and email address of the person you picked.

The Message field provides a way of conveying an additional message to the assignee. This field is not required.

The available buttons for this screen are as follows:

- **Confirm:** Completes the assignment and assigns the user to the task.
- **Back to Search:** This button brings you back to the list of users where you can remake your selection.
- **Back to Demand:** When this button is clicked you go back to the current demand.

#### SEE ALSO:

[Assign Demand to User](#)

[Assign Demand to Business Unit](#)

[Assign Task to Business Unit](#)

[Take Ownership](#)

## 5.2.30 Assign Task to Business Unit

You can assign a task by choosing the applicable task for the business unit and by clicking **Assign to Unit** next to the business unit you wish to assign to.

Begin by selecting a task from the Choose Task drop down menu.

### – Search/Select Business Units

Upon entering this action a list of Business Units will appear.

To narrow the list of Business Units displayed, enter a portion of the Business Unit name in the search field and click **Search Business Units**.

Locate the desired Business Unit and click the **Assign to Unit** button next to the Business Unit to which you would like to assign.

### – Confirm Task Assignment

Once you click assign to user a confirm assignment of task to user is displayed. This is simply to confirm the name and email address of the person you picked.

The Message field provides a way of conveying an additional message to the assignee. This field is not required.

The available buttons for this screen are as follows:

- **Confirm:** Completes the assignment and assigns the user to the task.
- **Back to Search:** This button brings you back to the list of users where you can remake your selection.
- **Back to Demand:** When this button is clicked you go back to the current demand.

**SEE ALSO:**

[Assign Demand to User](#)

[Assign Demand to Business Unit](#)

[Assign Task to User](#)

[Take Ownership](#)

### 5.2.31 Assign Task to Client

You can assign a task by choosing the applicable task for the client business unit and by clicking **Assign to Unit** next to the business unit you wish it to be assigned.

Begin by selecting a task from the Choose Task drop down menu.

#### – Search/Select Client Business Units

Upon entering this action a list of Business Units will appear.

To narrow the list of Client Business Units displayed, enter a portion of the Business Unit name in the search field and click **Search Business Units**.

Locate the desired Client Business Unit and click the **Assign to Unit** button next to the Business Unit to which you would like to assign.

#### – Confirm Task Assignment

Once you click assign to user a confirm assignment of task to user is displayed. This is simply to confirm the name and email address of the person you picked.

The Message field provides a way of conveying an additional message to the assignee. This field is not required.

The available buttons for this screen are as follows:

- **Confirm:** Completes the assignment and assigns the user to the task.
- **Back to Search:** This button brings you back to the list of users where you can remake your

selection.

- **Back to Demand:** When this button is clicked you go back to the current demand.

**SEE ALSO:**

[Assign Demand to User](#)

[Assign Demand to Business Unit](#)

[Assign Task to User](#)

[Take Ownership](#)

## 5.2.32 Take Ownership

**Note:** Take Ownership applies when the [E-Subro Hub Preferences](#) are set to Activate Two Step Demand Assignment Process. This is a company configuration item and is a rare workflow option. The "Take Ownership" action will also be available if you are reviewing a demand owned by another user or business unit AND you have the Subro Change Ownership privilege.

When entering a demand that has been assigned to you by another user, a Complete Demand Ownership Assignment screen will be displayed.

### – Take Ownership Options: Two Step Demand Assignment Process

You have the following choices from this screen:

- **Take Ownership:** This completes the ownership transfer and removes the demand from the work list of the user who assigned it.
- **View Only:** This option allows you to view the contents of the demand without accepting ownership. In this scenario, the demand remains in an outstanding state and will continue to be visible on the work list of the assigner.

### – Take Ownership - Other Owner

Take Ownership: Access the demand and click the Assign command → Take Ownership to assume ownership of the demand.

Note: if ownership was taken from a business unit, the demand can be released back to that business unit without using the Assign Demand to Business Unit action.

**SEE ALSO:**

[Assign Demand to User](#)

[Assign Demand to Business Unit](#)

[Assign Task to User](#)

[Assign Task to Business Unit](#)

### 5.2.33 Release Ownership

**Note:** The "Release Ownership" action will also be available if you are reviewing a demand that you took ownership from a business unit AND you have the Subro Change Ownership privilege.

You can only Release Ownership back to the business unit that you took ownership from.

### 5.2.34 Edit Liability Worksheet

In a manner very similar to the [Damages Worksheet](#), the Liability Worksheet is provided for internal use and should be completed by the individual appraising damages. The Liability Worksheet can be accessed under the **Worksheets** drop down menu → **Liability Worksheet** → **Edit Liability Worksheet**.

#### – Editing Liability Worksheet

Enter the percentage of responder liability as well as any notes about the change and click **Save** to commit the changes.

**SEE ALSO:**

[Add Evidence](#)

[Add Message](#)

[Add Payment](#)

[Close Demand](#)

[Edit Damages Worksheet](#)

[Edit Demand Detail](#)

[Print Demand](#)

### 5.2.35 View Liability Worksheet

In a manner very similar to the [Damages Worksheet](#), the Liability Worksheet is provided for internal use and should be completed by the individual appraising damages. The Liability Worksheet can be accessed under the **Worksheets** drop down menu → **Liability Worksheet** → **View Liability Worksheet**.

### 5.2.36 Edit Damages Worksheet

The Damages Worksheet is provided for internal use and should be completed by the individual appraising damages and can be accessed under the **Worksheets** drop down menu → **Damages Worksheet** → **Edit Damages Worksheet**.

#### – Editing Damages Worksheet

The [Original Damages Pane](#) is displayed to provide the details of the demand.

The Appraised Damages Pane provides an editable set of fields that correspond to the [Original Damages Pane](#).

Enter the Appraised Damages in the appropriate fields, enter any notes in the Appraisal Notes fields,

and click **Save** to commit the changes.

**SEE ALSO:**

[Add Evidence](#)

[Add Message](#)

[Add Payment](#)

[Close Demand](#)

[Edit Demand Detail](#)

[Edit Liability Worksheet](#)

[Print Demand](#)

### 5.2.37 View Damages Worksheet

The Damages Worksheet is provided for internal use and should be completed by the individual appraising damages and can be accessed under the **Worksheets** drop down menu → **Damages Worksheet** → **View Damages Worksheet**.

### 5.2.38 Send Message

The Reply to a Request functionality allows users to post public or private replies. Replies posted will associate themselves to the current demand in progress.

#### – Adding a Reply to a Request

To send a reply, choose the desired link from the **Negotiate > Reply to a Request** menu.

Enter the text of your reply in the text box and click the corresponding Send/Add button to insert the message or note.

**Note:** the Add Message option will be visible to both parties' Activity Log and will put a Message icon on the opposing party's Work List. The Add Internal Note option will not be visible on the opposing party's Activity Log.

When the message is saved it will then display in the Activity Log. Choose the Less Detail option to focus primarily on messages and notes.

**SEE ALSO:**

[Add Evidence](#)

[Add Payment](#)

[Close Demand](#)

[Edit Damages Worksheet](#)

[Edit Demand Detail](#)

[Edit Liability Worksheet](#)

[Print Demand](#)

### 5.2.39 Print Demand

Print Demand provides a method for printing all or selected components of the demand. This action is access under the **Manage Demand** menu → **Print Demand** and will create a PDF document of the selected option.

## Print Options

Print Options Definitions:

- **Print Full Demand (With All Evidence):** Prints everything associated with the demand including all evidence.
- **Print Full Demand (With Opposing Party Evidence Only):** Prints everything associated with the demand except for the current party's evidence.
- **Print Full Demand (Without Evidence):** Prints everything associated with the demand except its evidence.
- **Print Parts of the Demand:** Requires the selection of one or more of the following.
  - **Demand Details (Detail, Negotiations & Attachment List)**
  - **Attachment Evidence**
  - **Activity Log**

After your selection, click Generate PDF Preview.

**SEE ALSO:**

[Add Evidence](#)

[Add Message](#)

[Add Payment](#)

[Close Demand](#)

[Edit Damages Worksheet](#)

[Edit Demand Detail](#)

[Edit Liability Worksheet](#)

## 5.2.40 Task Assigner

If you've assigned tasks to other users, you'll need a way to see those tasks, and determine their status. The [My Tasks](#) page can help you do this.

Use the filter section at the top of the page to focus the list of tasks.

See the Task Status column to determine if the task is Open or Completed or Reassigned.

The [My Tasks](#) page contains the following:

## Task Filter Options

Click **Show Filter Details** to open the filter. Use the filters in the Task Filter page to narrow the list of tasks. This lets you view only those that matter to you.



- **Role:** Allows you to set the filter according to your role. Select *I am the assigner* to show only the tasks you have assigned.
- **Task Type:** Allows you to focus on a certain type of task such as Add Evidence, Verify Damage Amounts, or Determine Liability.
- **Status:** Allows you to narrow the search based on whether the task has been flagged as Open, in Process, Completed, Rejected or Errored.
- **Retrieve Tasks:** Used to change the list of results each time a change is made to a filter.

### – Tasks and Task Status

After the filter has been applied, tasks and task statuses are shown in the list.

The task name in the Task column displays as a link.

Click the task name (e.g. Verify Damage Amounts) to move directly to the page where the task information exists.

TPA column notes if the demand is being handled by a TPA.

### – Task Assignment

To assign a task to another user or business unit, open the demand for which the task will be assigned.

In the Demand Action Menu Bar, click the Assign menu item and choose the type of assignment you'd like to complete.

- **Assign Task to User:** Assigns a task to an individual. The individual will be able to see a listing of tasks to be completed.
- **Assign Task to Business Unit:** Assigns a group of individuals in a business unit a task to perform on a demand.

For more specific information regarding Assigning Tasks, see the [Assign Task to User](#) or [Assign Task to Business Unit](#) page.

#### SEE ALSO:

[Task Assignee](#)

## 5.2.41 Task Assignee

As a person who is looking to complete a task you will have to modify the filter to display tasks that are assigned to you and click on the task you wish to perform. Tasks that have been assigned to you can be accessed through the E-Subro menu → My Demands → My Work List or E-Subro menu → My Tasks.

### – Task Filter Options

Click **Show Filter Details** to open the filter. Use the filters in the Task Filter page to narrow the list of tasks. This lets you view only those that matter to you.

- **Role:** Allows you to set the filter according to your role. Select ***I am the assigner*** to show only the tasks you have assigned.
- **Task Type:** Allows you to focus on a certain type of task such as Add Evidence, Verify Damage Amounts, or Determine Liability.
- **Status:** Allows you to narrow the search based on whether the task has been flagged as Open, In Process, Completed, Rejected or Errored.
- **Retrieve Tasks:** Used to change the list of results each time a change is made to a filter.

### – Tasks and Task Status

After the filter has been applied, tasks and task statuses are shown in the list.

The task name in the Task column displays as a link.

Click the task name (e.g. Verify Damage Amounts) to move directly to the page where the task information exists.

TPA column notes if the demand is being handled by a TPA.

### – Completing the Task

1. **Attach Evidence:** Access the demand from E-Subro → My Tasks → Demand or Task Name link. Review the task message on the Evidence tab. Complete the task then click Flag Complete command.
2. **Verify Damage Amount:** Access the demand from E-Subro → My Tasks → Demand or Task Name link. Review the task message on the Damages Worksheet page. Edit the worksheet if appropriate. Change the Task Status: Open, In Process, Completed.
3. **Verify Liability Decision:** Access the demand from E-Subro → My Tasks → Demand or Task Name link. Review the task message on the Liability Worksheet page. Edit the worksheet if appropriate. Complete the task by clicking Flag Task Complete.

**SEE ALSO:**

[Task Assigner](#)

## 6 Other Topics

This section covers topics not seen elsewhere in the help.

### Topics in this section:

1. [Demand Summary Information](#) covers the specifics of the demand summary.
2. [My Tasks](#) discusses the use of that screen.
3. [Team Handling](#) describes the components used to facilitate this approach to working demands.

## 6.1 Demand Summary Information

The Demand Summary information is provided as a way of quickly referencing details of the demand that you are currently accessing.

### – Demand Summary Information Details

(D) and (R) are used next to names of certain information to indicate Demander and Responder respectively.

The top summary provides many details including:

- **Demander:** The insurance company representing the demander is shown.
- **Responder:** The insurance company representing the responder is shown
- **Claim #(D):** The claim number for the demander is displayed.
- **Claim #(R):** The claim number for the responder is displayed.
- **Original Damages:** A dollar amount asked by the demander is shown.
- **Demand Status:** Ignore, New, Outstanding, Issued, In Negotiation, Pending, Closed, Accepted, Denied are the possibilities for demand status.

**Note:** Outstanding includes open demands in the Issued, In Negotiation, Pending Accepted and Denied status.

- **Response Amount (R):** The response amount in dollars and cents is shown.
- **Total Payment Amount:** The total payment for this particular demand is given.
- **Demand Amount (D):** The demander's total demand in dollars is shown.

**SEE ALSO:**

[Demand Creation](#)

## 6.2 My Tasks

My Tasks is provided as a separate listing of all the tasks that have been assigned to a specific user.

### – Accessing My Tasks

My Task List is accessed via the top level AF menu: E-Subro > My Tasks.

### – Custom List

To create a custom list, select **Custom** from the Current List drop down.

Select the desired choices of the following:

- **Role:**
  - **Assigned to me:** Limits the search criteria to tasks assigned to you or business units to which you are associated.
  - **Assigned to Bus. Units or Me:** Limits the search criteria to tasks assigned to entire business units or you.
  - **I am the assigner:** Limits the search results to those tasks assigned by you.
- **Task Type:**
  - **Ignore Filter:** This option turns off this filter option.
  - **Add Evidence:** Limits search results to those demands that need evidence added.
  - **Verify Damage Amounts:** Limits search results to those demands that need to verify damage amounts.
  - **Determine Liability:** Limits search results to those demands need to determine liability.
- **Status:**
  - **Ignore Filter:** This option turns off this filter option.
  - **In Process:** Limits the search results to those demands where the task has been started but not completed.
  - **Completed:** Limits the search results to those demands that are currently completed.
  - **Rejected:** Limits the search results to those demands rejected by the assignee.

- **Errored:** Limits the search results to those demands errored by the assignee.

### – Export Query

You can export the results of a list to an Excel or .PDF document. Both documents render an excellent overview of the search results and provide a significantly faster method of searching large numbers of pages.

Export options: [Excel](#) | [PDF](#)

*Export options*

Click the preferred file type and you will be asked if you would like to open or save the document. Your document will open with the results in them.

#### SEE ALSO:

[My Work List](#)

[Other Preset Demand Lists](#)

[Custom Demand Lists](#)

## 6.3 Team Handling

Team Handling within E-Subro Hub is made possible by a series of interrelated components which provide for an effective manner in which a group or team can work from a given set of demands.

In order to work in a team oriented manner, there are a few administrative tasks which must be completed. See [Team Handling Setup](#) for additional information.

### – Team Handling - Business Units (Teams)

In order for individual users to work in a team based format, those users must all be associated to the same Business Unit. Once this is completed, each user will then work from [My Work List](#) just as if they were working individually.

Demands that are to be worked by the team should be assigned to the Business Unit that team members belong to. This allows the demands that are common to the team to be displayed on each member's [My Work List](#).

The default parameters for the My Work List will show demands owned by the individual user and/or their associated business unit.

However, any demands which need attention that are assigned to an individual user will be displayed only on that user's [My Work List](#).

### – Team Handling - User Concurrency

E-Subro Hub includes functionality to prevent data corruption by allowing only one action to be taken on a given demand at a given time.

Upon entering a demand, if another user is already working in the same demand a message will be displayed with the details about the other users last action and whether you can proceed or are required to wait until the first user completes an action.

### – Team Handling - Diaries

[Diaries](#) in a team format are used just like diaries in an individual format. When set, a diary is associated with a demand and will stay with that demand should the demand be transferred to another owner.

If the demand continues to be owned by the team (Business Unit), it will reappear on [My Work List](#) of all users who are associated with that team when a diary expires.

### – Team Handling - My Work List

When using the team handling approach, [My Work List](#) is used in the same manner that it would be used in an individual format. The list will display those demands which are assigned to the team (Business Unit) as well as any demands which are assigned to the individual user who is viewing the list.

### – Team Handling - Get Next Work Button

The Get Next Work button provides an easy method for either individual users or teams to obtain the next available demand from [My Work List](#) without the concern of choosing a demand that someone else is already working.

Click the Get Next Work button to access the next available demand from [My Work List](#) upon completion of your current work.

**Note:** If you view a demand without making one of the changes that clears the action flag and then click Get Next Work, you will be shown the same demand as it will still be considered the next available demand on [My Work List](#). If you want to proceed beyond this demand, you will need to take an action, such as setting a [Diary](#), that will clear the action flag.

#### SEE ALSO:

[Team Handling Setup](#)

[Business Unit Maintenance](#)

[The Diary Feature](#)

[My Work List](#)

## 6.4 Team Handling Setup

The concept of [Team Handling](#) is primarily about a method of working in E-Subro Hub but it does require a minor amount of setup and understanding in order to use it.

### – Required Setup

[Business Units](#) (teams) must be set up and have all those users who are part of the team assigned

to the Business Unit.

Users are assigned to Business Units within [User Maintenance](#).

### – Usage

Demands that are to be worked by the team should be assigned to the Business Unit - not the individual user.

Demands which are assigned to the [Business Unit](#) will be seen on the [My Work List](#) of every user who belongs to the Business Unit.

Demands which are assigned to the individual user will be seen on the [My Work List](#) of only that user.

#### SEE ALSO:

[Team Handling](#)

[Business Unit Maintenance](#)

[The Diary Feature](#)

[My Work List](#)

## 6.5 Mass Reassign

Mass Reassign is a guided four-step process that provides an easy method of transferring demands and/or tasks from one user/team to another user/team. For example, when employee turnover occurs, the demands for the outgoing employee need to be reassigned to one or more other employees.

**Note:** AF recommends transferring all demands (including closed) from an outgoing employee to an active employee to ensure that demands which are subsequently reopened (via supplement, etc.) will go to an active user's My Work List. The ability to Mass Reassign is a specific privilege that must be given by a Security Administrator to an individual user.

### – Find User/Business Unit to Transfer From

Search for the user or business unit you want to transfer from by clicking the appropriate radio button to select either By Users or By Business Unit. Making this choice will change what is displayed below these buttons.

#### By Users

Enter as much or as little information as you would like to search on in the corresponding fields and click **Search Profiles** to execute the search.

Locate the desired user from the results list and click **Select** to proceed.

#### By Business Unit

When searching by business unit, you have the option of either entering some information into the search field or simply leaving it blank. Click **Search Business Units** to execute the search.

Locate the desired business unit from the results list and click **Select** to proceed.

### – Choose Work to Transfer

Choosing the work to transfer varies slightly based on the type of work being transferred.

#### **Demands**

You can choose to select all of the demands by simply ensuring that the checkbox indicating the demands is selected. The number of demands selected will be displayed.

You can choose to select only some of the demands by clicking the **Choose Demands from List** button and using the Demand Listing screen to filter and/or select demands as desired.

#### **Tasks**

Tasks can only be selected as a whole. Check or uncheck the corresponding checkbox as appropriate.

### – Find User/Business Unit to Transfer to

Search for the user or business unit you want to transfer to by clicking the appropriate radio button to select either By Users or By Business Unit. Making this choice will change what is displayed below these buttons.

#### **By Users**

Enter as much or as little information as you would like to search on in the corresponding fields and click **Search Profiles** to execute the search.

Locate the desired user from the results list and click **Select** to proceed.

#### **By Business Unit**

When searching by business unit, you have the option of either entering some information into the search field or simply leaving it blank. Click **Search Business Units** to execute the search.

Locate the desired business unit from the results list and click **Select** to proceed.

### – Complete Transfer

Once you have selected the user or business unit to transfer to, a screen will be displayed that summarizes the action that is about to take place. Click **Confirm** to proceed with the action as outlined or **Cancel** to be taken back to the previous step.

Once the transfer is complete, a screen will be displayed showing the action was successful. Click **Ok** to be taken to the AF Home page.

**SEE ALSO:**



[User Maintenance](#)  
[Business Unit Maintenance](#)  
[Assign Demand to User](#)  
[Assign Demand to Business Unit](#)  
[Assign Task to User](#)  
[Assign Task to Business Unit](#)  
[Take Ownership](#)

## 7 Administration

The Administration section details how to maintain the company and user setup for E-Subro Hub.

**Note:** You must have administrative privileges in order to access this part of the Arbitration Forums web site. If you are not able to access the sections described, it is likely because you do not have the appropriate privileges.

If you need to be granted administrative privileges, please contact your E-Subro Hub Administrator. If your company is not yet setup for E-Subro Hub, you may need to contact Arbitration Forums Support (888-ESUBRO1 or 888-378-2761) to initiate the process.

### Topics in this section:

1. [User Maintenance](#) covers the specifics of setting up and maintaining users for E-Subro Hub.
2. [Business Unit Maintenance](#) discusses the setup and administration of Business Units (teams).
3. [E-Subro Preferences](#) describes the components used to set some system-wide choices.
4. [Routing Rules](#) details the automatic routing that can be done within E-Subro Hub.
5. [Team Handling Setup](#) provides details about setting up a team based work environment.

### 7.1 Business Unit Maintenance

Business Units are simply a method for assigning multiple users to a group or team.

**Note:** You must have administrative privileges in order to access this part of the Arbitration Forums web site. If you are not able to access the sections described, it is likely because you do not have the appropriate privileges.

If you need to be granted administrative privileges, please contact your E-Subro Hub Administrator. If your company is not yet setup for E-Subro Hub, you may need to contact Arbitration Forums Support (888-ESUBRO1 or 888-378-2761) to initiate the process.

#### — Accessing Business Unit Maintenance

Business Unit Maintenance is accessed via the top level AF menu: Administration > Business Unit Maint

#### — Business Unit Maintenance List

This page displays a list of existing Business Units.

Click **Add New Business Unit** to create a new group or team.

Click the corresponding **Edit** button to modify an existing Business Unit.

### – Add New Business Unit

To add a new business unit, enter the requested information in the appropriate fields and click **Save**.

**Note:** None of the fields are required but can be necessary to provide contact information in a team handling workflow. When a demand is transferred to a Business Unit, the Rep Info section will only change if the Contact Name and Phone fields have been completed for the Business Unit.

### – Edit Existing Business Unit

To edit an existing business unit, enter the desired changes in the appropriate fields and click **Save**.

**Note:** None of the fields are required but can be necessary to provide contact information in a team handling workflow. When a demand is transferred to a Business Unit, the Rep Info section will only change if the Contact Name and Phone fields have been completed for the Business Unit.

### – Delete Existing Business Unit

An existing Business Unit cannot be deleted once used. However, the Business Unit can be rendered obsolete by removing all user associations and renaming the Business Unit (e.g. Obsolete Business Unit; 1)

**SEE ALSO:**

[User Maintenance](#)

[E-Subro Preferences](#)

[Routing Rules](#)

## 7.2 User Maintenance

The User Maintenance section provides a method of creating and maintaining users.

Click the **List Users** button to see a list of users within your company.

Click the **Edit** button next to a specific user's name to change settings for that user.

**Note:** You must have administrative privileges in order to access this part of the Arbitration Forums web site. If you are not able to access the sections described, it is likely because you do not have the appropriate privileges.

If you need to be granted administrative privileges, please contact your E-Subro Hub Administrator. If your company is not yet setup for E-Subro Hub, you may need to contact Arbitration Forums Support (888-ESUBRO1 or 888-378-2761) to initiate the process.

## – Accessing User Maintenance

User Maintenance is accessed via the top level AF menu: Administration > User Maintenance

## – User Maintenance List

The User Maintenance List provides a method for locating an existing user or adding a new user.

### To add a New User:

1. Select a Business Unit (All users must be associated with at least one Business Unit - Click Change to modify the current selection).
2. Click **Add New User**.
3. Enter the pertinent information on the User Info screen.
4. Click **Save Changes**.

### To list existing Users:

1. Fill in the desired fields to limit the number of users returned.
2. Click **List Users**.

**Note:** If the user selects a specific Business Unit as a search parameter the list will only include Users with a primary association to that unit.

## – Edit User

Select the User you wish to edit by clicking **Edit** on the appropriate line.

## – User Info

The User Info tab contains the details for the user. Complete this section as desired and click **Save Changes**.

**Note:** The email address on the User Info page will NOT dictate where this users [email notifications](#) are sent for E-Subro Hub and arbitration activity. However, this is the address where notifications will be sent for a password reset. The email address from the user's profile will be used for notifications. This profile must be maintained by the user under the Member Access → Edit My Profile drop down menu.

## – Set Business Units

[Business Units](#) are simply groups or teams of users created by your organization to facilitate certain activities within E-Subro Hub.

A detailed understanding of Company workflows would be important when making a Business Unit association (i.e. team handling and routing).

Use the Set Business Units tab to associate this user to the business units they belong to and click **Save Changes**.

### – Set Groups

Groups are bundled sets of individual privileges. Choose the desired groups by clicking the appropriate check boxes under Available Groups and click the right hand arrow button to move the selected groups to the Assigned Groups list.

Use the left pointing arrow button to unassign groups.

**Note:** the Customer Users set of privileges usually provides most privileges needed for E-Subro Hub and arbitration activity.

### – Set Privileges

User privileges are VERY important. Without the appropriate privileges, the AF web site will not let the user perform the desired actions.

Use this tab to assign privileges in a piecemeal fashion (one by one), or to add privileges that were not conferred by the assigned groups.

**Note:** administrative privileges should only be assigned to users who have administrative responsibilities.

### – User Privileges

Use this tab to VIEW the privileges assigned to this user. This tab does not allow you to change privileges.

**SEE ALSO:**

[Business Unit Maintenance](#)

[E-Subro Preferences](#)

[Routing Rules](#)

## 7.3 E-Subro Preferences

E-Subro Preferences are used to configure your company's use of E-Subro Hub.

**Note:** You must have administrative privileges in order to access this part of the Arbitration Forums web site. If you are not able to access the sections described, it is likely because you do not have the appropriate privileges. When setting the Company configurations, the Security Administrator can confer with an AF implementation specialist to make sure the settings facilitate established workflows.

If you need to be granted administrative privileges, please contact your E-Subro Hub Administrator. If your company is not yet setup for E-Subro Hub, you may need to contact Arbitration Forums Support (888-ESUBRO1 or 888-378-2761) to initiate the process.

### – Accessing E-Subro Preferences

E-Subro Preferences is accessed via the top level AF menu: Administration > Company Preferences > E-Subro Preferences

### – Notification Preferences

This tab provides the ability to choose how email [notifications](#) are sent.

For the individual owner as well as the [Business Unit](#) (team), the type of notification for both High Priority and Low Priority items can be determined by the selection on this screen.

Choose the desired type from each drop down list and click **Save** to commit the changes.

### – Demander Requested Fields

This screen provides the ability to define those fields within a demand that your company prefers to have completed at the time the demand is created as the demanding party.

Click the appropriate boxes to select the items that you want your employees to enter at the time the demand is created and click **Save** to commit the changes.

### – Responder Requested Fields

This screen provides the ability to define those fields within a demand that your company prefers to have completed at the time the demand is created as the responding party.

Click the appropriate boxes to select the items that you would like the opposing party to enter at the time the demand is created and click **Save** to commit the changes.

### – Demander Requested Evidence

This screen provides the ability to define the evidence that your company prefers to have included at the time the demand is created as the demanding party.

Click the appropriate boxes to select the evidence that you want your employees to add at the time the demand is created and click **Save** to commit the changes.

### – Responder Requested Evidence

This screen provides the ability to define the evidence that your company prefers to have included at the time the demand is created as the responding party.

Click the appropriate boxes to select the evidence that you would like the opposing party to add at the time the demand is created and click **Save** to commit the changes.

### – E-Subro Hub Configuration

E-Subro Hub Configuration provides a method of configuring certain activities related to the workflow within the system.

#### **Auto-Close**

Auto-Close provides the ability to automatically close your demands when a responder accepts your demand or when a responder acknowledges your acceptance of their offer.

Make the appropriate changes from among the available items and click **Save** to commit the changes.

### Batch Printing

Items listed here relate to the Batch Print functions within E-Subro Hub.

Make the appropriate changes from among the available items and click **Save** to commit the changes.

**Note:** Batch Print capabilities are a specific privilege assigned to a user and requires additional Batch Print Administration for the specific user.

### Subro - Online Filing

Items listed here enable or disable specific functions related to how E-Subro Hub and Online Filing interact.

Make the appropriate changes from among the available items and click **Save** to commit the changes.

### General Options

Items listed here vary and are used to selectively enable or disable specific functions as described in the column next to each individual item.

Make the appropriate changes from among the available items and click **Save** to commit the changes.

**SEE ALSO:**

[Business Unit Maintenance](#)

[User Maintenance](#)

[Routing Rules](#)

## 7.4 Routing Rules

This page provides information needed to create and maintain routing rules.

**Note:** You must have administrative privileges in order to access this part of the Arbitration Forums web site. If you are not able to access the sections described, it is likely because you do not have the appropriate privileges. When setting the Company configurations, the Security Administrator can confer with an AF implementation specialist to make sure the settings facilitate established workflows.

If you need to be granted administrative privileges, please contact your E-Subro Hub Administrator. If your company is not yet setup for E-Subro Hub, you may need to contact Arbitration Forums Support (888-ESUBRO1 or 888-378-2761) to initiate the process.

### Accessing Routing Rules

Routing Rules is accessed via the top level AF menu: Administration > Company Preferences > Routing Rules

## – Create and Maintain RuleSets

Routing rules determine where a Demand will be routed when first issued to your company. A RuleSet is a complete set of Rules that will be applied when determining where to route an issued Demand. Multiple RuleSets may be maintained, but only one RuleSet may be active at any time. Other RuleSets may be expired, scheduled to be active in the future, or inactive.

Click the **Create New RuleSet** button to create a new RuleSet, then use the **Edit Rules** link on the right side of the page to modify the rules and conditions within the RuleSet (see the next section for additional information on editing the rules).

When a RuleSet is first created, you will need to set an initial rule based on the Rule Type. Choose State of Loss to build a RuleSet based on the state in which the loss occurred. Choose Relateds to build a RuleSet based on whether a case exists within E-Subro Hub that is related to the incoming case (see the next section for additional information on editing the rules).

Once you have made all necessary modifications, use the **Activate** link to activate the RuleSet.

## – Edit Rules

The rules within a RuleSet are designed for routing based on either the State of Loss and/or Relateds.

For each rule, the destination can be:

- A routing to a Business Unit, or
- The invoking of another rule.

**Note:** clicking the Edit Rules action is essentially creating a NewRuleSet from the existing parameters.

### Editing State of Loss Rules

A default condition is provided for each State rule. The default is a catch-all condition and will determine routing when the state has not been mapped in another condition.

Choose the appropriate action for the default condition by selecting it from the Do This drop down list and selecting any supporting information which may be needed.

Click **Add Condition** to add another layer of rules.

Click the **Back to RuleSets** link when you have completed your changes.

**Note:** This page saves automatically. Your last save date/time will be displayed at the top of the screen.

### Editing Relateds Rules

Relateds rules are built on True/False conditions and provide the ability to either route the demand or invoke another rule based on whether related E-Subro Hub cases are found.

Choose the appropriate action for each condition by selecting it from the left hand drop down and selecting the corresponding supporting information from the right hand drop down list.

**Note:** This page saves automatically. Your last save date/time will be displayed at the top of the screen.

**SEE ALSO:**

[Business Unit Maintenance](#)

[User Maintenance](#)

[E-Subro Preferences](#)

## 7.5 Batch Print Admin

Batch Print Admin allows an administrator to assign a business unit or set of business units to a particular user which will allow that user to view and work with those demands which have been manually or automatically queued to the Batch Print process.

**Note:** You must have administrative privileges in order to access this part of the Arbitration Forums web site. If you are not able to access the sections described, it is likely because you do not have the appropriate privileges. When setting the Company configurations, the Security Administrator can confer with an AF implementation specialist to make sure the settings facilitate established workflows.

If you need to be granted administrative privileges, please contact your E-Subro Hub Administrator. If your company is not yet setup for E-Subro Hub, you may need to contact Arbitration Forums Support (888-ESUBRO1 or 888-378-2761) to initiate the process.

### — Accessing Batch Print Admin

In order to access Batch Print Admin, the Batch Print Feature must be enabled under *Administration > Company Preferences > E-Subro Preferences > E-Subro Hub Configuration tab*. See [E-Subro Preferences](#) for additional information.

Once the Batch Print Feature is configured, you can access Batch Print Admin via *Administration > Company Preferences > Batch Print Admin*.

Users will also need to have the Subro Batch Print privilege assigned via *Administration > User Maintenance > Set Privileges tab*.

### — Assigning Business Units to a User for Batch Print

From the Batch Printing Business Unit Maintenance page, locate the user that you would like to assign Batch Printing Business Units to by entering information in one or more of the fields and clicking **Search Profiles**.

Click the **Select User** link next to the appropriate user.

Add or modify the assigned business units by clicking **Search Business Units, Select All Business Units**, or checking or unchecking the corresponding box.



When a Business Unit is selected, the Batch Print User will be able to see Batch Print ready demands associated with those business units. Example: If the Batch Print User is selected to see only Business Unit A demands, they will not be able to see demands worked under Business Unit B. This applies if the demand is owned by the Business Unit or by a user associated with that Business Unit.

Click **Save** to enter your changes.

**SEE ALSO:**

[Batch Printing](#)

[Business Unit Maintenance](#)

[E-Subro Preferences](#)

## 8 FAQ's

### I am the Demander:

#### — I need to create and issue a demand

E-Subro Hub allows demanders to create demands and send them to responding carriers quickly and easily.

1. Does your company issue demands via E-Subro Hub? - First things first, your company needs to make the decision to allow you to create and issue demands via E-Subro Hub. Once that decision is made, an Arbitration Forums technical representative will flip a switch that will allow your company to see the Add Demand menu item under the top level E-Subro menu.
2. Do you have the privileges to Add a Demand? - Someone at your company must manage the list of users who can and cannot take certain actions within the Arbitration Forums web site. We'll call this person your Hub Administrator.

Your Hub Administrator will need to give you the CUSTOMER USERS privilege group which includes the privileges needed to add a demand. Alternatively, if you are only allowed to see the Subro actions, they can give you the specific privileges of:

Subro View Demand  
Subro Edit Demand (demander)  
Subro Attachments  
Subro Issue Demand

3. Once these are complete, you should be able to... Use the Add Demand Menu Item to begin adding a demand. For more information, see the [Add Demand](#) section.

#### — I need someone else to add evidence to my demand

### Assign a Task:

The E-Subro Hub allows certain tasks to be assigned and completed by users who are not the owner of the demand.

For instance, in some cases, a Subrogation Rep will create a demand, but not add the evidence documents. Instead, they will leave this task for another user who specializes in adding evidence to all of the outgoing demands.

To alert the user who will add the evidence, simply use the Assign Task to User action (accessible from within the demand).

Inside the Assign Task to User action, choose the task to assign. In this case (Figure 2.) we're assigning the Add Evidence task.

This task shows an amount and a date. Had a supplement been added, another Add Evidence task would be present with the supplemental amount and date, to allow you to specify what values the evidence will apply to.

Next, use the search criteria to identify the user who will complete the task. In this example, we'll assign the task to Michelle Attachment (that's really her name; Really!)

So, in the search, we can enter the first few letters of her last name and click the Search Profiles button.

When the search is complete, a list of user matches appears at the bottom of the page. Click the "Assign to User" button for the specific user that will be assigned this task.

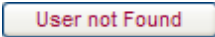
**Note:** You may use any of the search criteria to narrow the list of users. For instance, if you've searched for last name Smith, you might get 25 users found. To narrow the search, you might try entering a first name and clicking Search Profiles again.

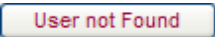
If your search returns NO matches, it may mean that no records exist in the database.

It could also mean that you've entered conflicting information in the search criteria. Try starting the search using only a single field in the search criteria.

If there are truly no matches, keep this in mind: The search only looks for users with a completed profile within the Arbitration Forums web site. If the user you're looking for has never been in the system before (or if they've never completed a profile), you will not find them in this list.

### User Not Found:

If you can't find the user in this list, you can still assign the task to them. To do so, use the  button, as follows:

Click the  button (on the right side of the search page) and follow the instructions.

You'll be asked to enter a viable email address or physical address for the user (using email is easier and faster).

A notification will be sent to the user, with a link to access the demand via E-Subro Hub. If the user enters the E-Subro Hub to complete the task, they will be required to complete their profile. Once they do so, the next time you try to assign a task to them, you'll find them in the Search Profiles list.

### **I want to upload evidence items into an Online Filing arbitration**

Evidence that has been uploaded to an E-Subro Hub demand will be moved across to Online Filing when an arbitration is initiated via E-Subro Hub.

To add an online filing with uploaded evidence items, complete the following steps:

1. Create and Issue a demand in E-Subro Hub:

For more information, click here to learn how to [create a Demand](#).

2. Review the evidence in the demand:

When you are ready to send the demand to arbitration (Online Filing), check to see that ALL of the evidence for this arbitration has been uploaded to the E-Subro demand.

IMPORTANT: Online Filing does NOT allow for the upload of evidence at this time, so you'll need to make sure that the E-Subro demand has the right evidence before initiating the arbitration.

Add any missing evidence at this time.

3. Send the demand to Arbitration:

Click the Arbitration link to initiate the arbitration process.

It can be found under the Negotiate action item:

4. View the evidence within your Online Filing case in process:

Follow the prompts to begin the arbitration process.

Once you've reached the Online Filing case, note that the evidence items have been included within the Evidence tab.

Online Filing does not allow direct upload of evidence items. The only way to upload evidence to Online Filing is through E-Subro Hub.

If you find that a "case in process" does not have all of the appropriate evidence items (and you initiated it from E-Subro Hub), you have two choices:

- a. Delete the "case in process" and start over from E-Subro Hub (first adding new evidence items to the Hub)
- b. Continue with the current "case in process" and manually add new evidence items to the case (requires documents to be mailed to Arbitration Forums)

### **I am the Responder:**

#### **I need to respond to a supplement**

See for information about supplements.

### Other:

— **I need help with email notifications**

See [Notifications](#) and [E-Subro Preferences](#) for information about user logins.

— **I need help with user logins**

See [Accessing E-Subro Hub](#) for information about user logins.

**SEE ALSO:**

[User Maintenance](#)

[Business Unit Maintenance](#)

[Routing Rules](#)

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