



AMERICAN ARBITRATION ASSOCIATION®

# ACCESSING TASKS AND ACTIONS MENU



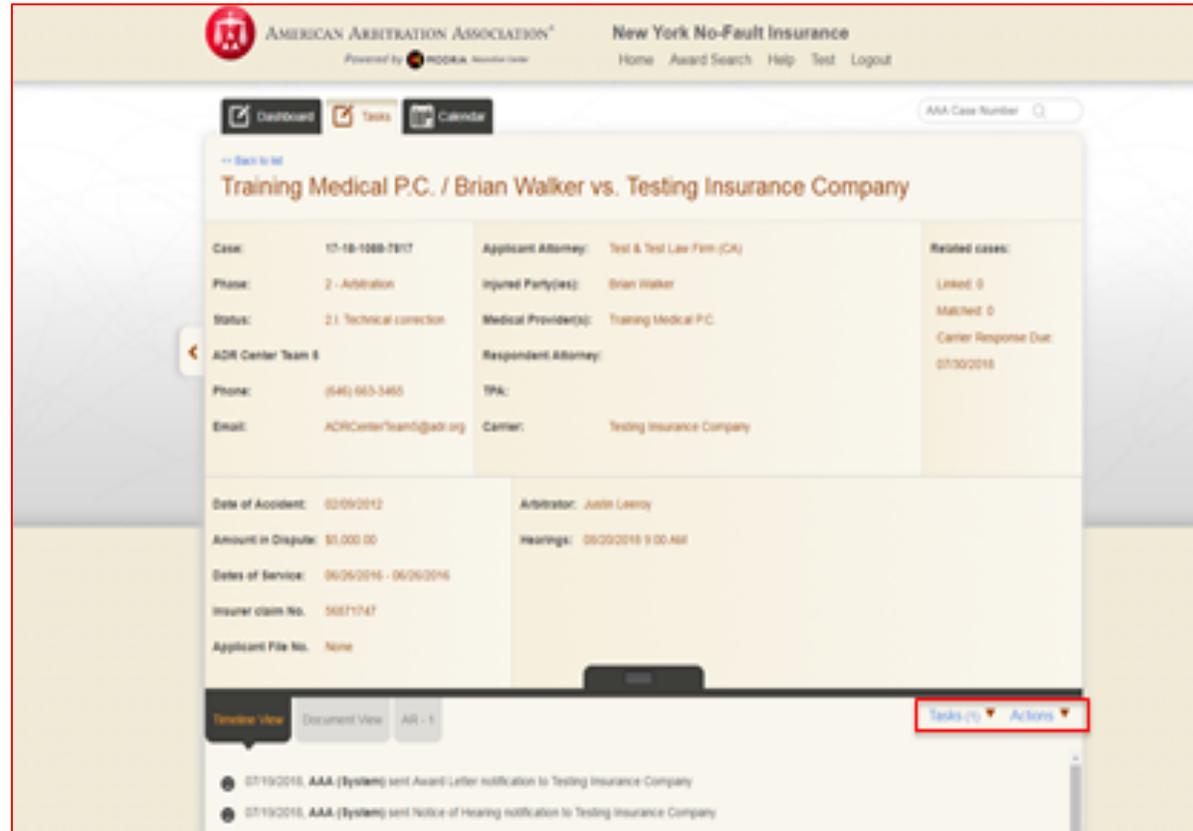
## TASKS TAB

Tasks and Actions are accessible within the case record itself. From your user home page, access a case record by hovering your mouse over the row of the case you want to access. As you do so, the row will highlight. Click anywhere within the row to access that case record.

CASE NUMBER	APPLICANT ATTORNEY	ATTORNEYS	INJURED PARTY	CLAIMS ATTORNEY	TIN	CARRIER	STATUS	AMOUNT IN DISPUTE	FILING DATE	ARBITRATOR
17-18-1028-7917	Test & Test Law Firm (CA)	Training Medical PC	Brian Walker			Testing Insurance Company	2:1 Technical correction	\$ 5,000.00	06/29/2018	Justin Leamy

## TASKS AND ACTIONS MENUS

The **Tasks and Actions** menus are located to the right-center of a case.



## TASKS

**Tasks** are pending actions on a case that require a specific user to review and/or complete. The number of **Tasks** due on the case will be indicated in the parenthesis.

To access the **tasks** menu, simply hover your mouse over it.

The screenshot displays the AAA case management system. At the top, the header includes the AAA logo, the text 'AMERICAN ARBITRATION ASSOCIATION', and 'New York No-Fault Insurance'. Below the header, there are navigation tabs for 'Dashboard', 'Tasks', and 'Calendar'. The main content area shows the case title 'Training Medical P.C. / Brian Walker vs. Testing Insurance Company' and various case details such as Case Number (17-18-1088-7817), Applicant Attorney (Test & Test Law Firm (CA)), and Respondent Attorney (Testing Insurance Company). A blue arrow points to the 'Tasks (0)' link in the bottom right corner of the case details section.

## TASKS

When your mouse is hovered over the **Tasks** menu, the menu options will appear and display any pending tasks due on a specific case. Pending tasks due on a case will be dependent on what Phase and Status a case is in and if there are any occurrences or milestones on a case that would cause a **Task** to be triggered.

To access a task, click on the one you want to complete.

The screenshot shows the AAA portal interface for a case titled "Training Medical P.C. / Brian Walker vs. Testing Insurance Company". The page includes a navigation bar with "Dashboard", "Tasks", and "Calendar" options. A search bar for "AAA Case Number" is visible in the top right. The case details are organized into several sections:

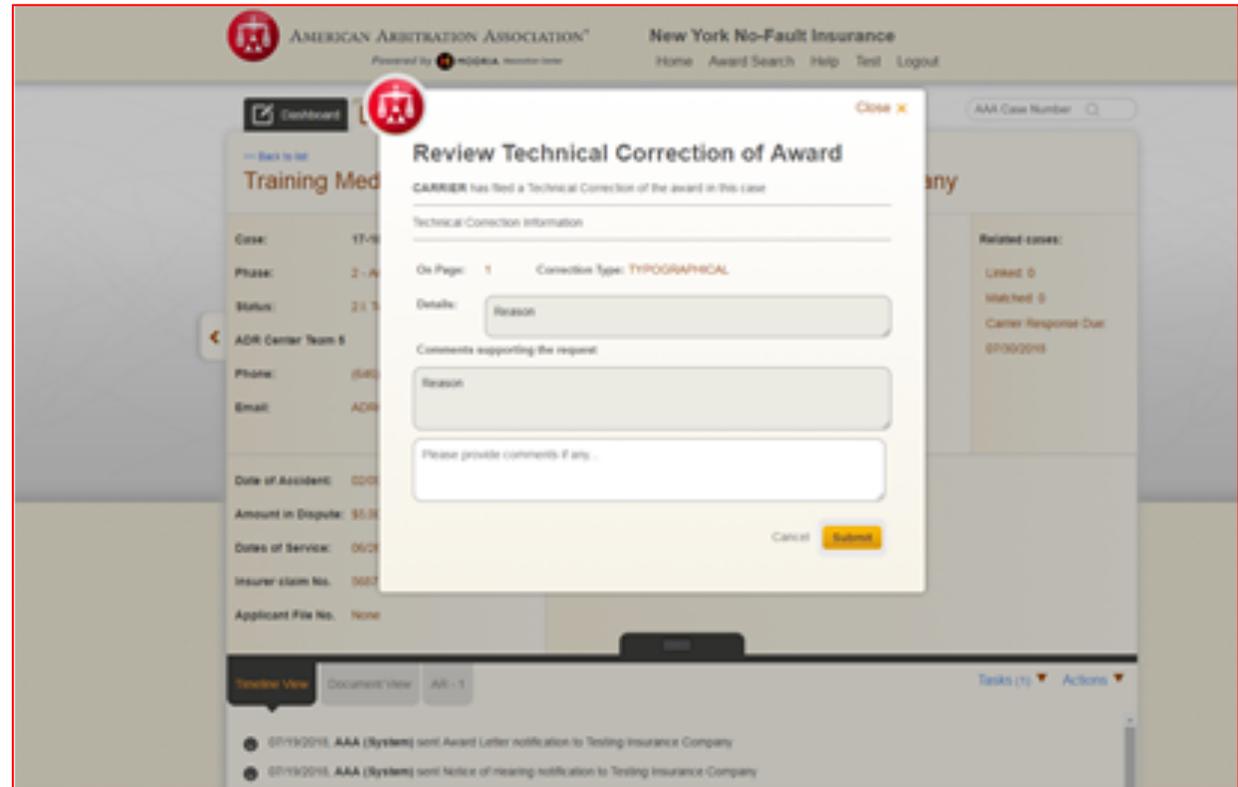
- Case Information:** Case: 17-18-1088-7817, Phase: 2 - Arbitration, Status: 2.1 Technical correction, ADR Center Team 8, Phone: (848) 843-3405, Email: ADRCenterTeam8@adr.org.
- Attorney and Party Information:** Applicant Attorney: Test & Test Law Firm (CA), Injured Party(ies): Brian Walker, Medical Provider(s): Training Medical P.C., Respondent Attorney: [blank], TPA: [blank], Carrier: Testing Insurance Company.
- Related Cases:** Linked: 0, Matched: 0, Carrier Response Due: 07/30/2018.
- Accident and Hearing Details:** Date of Accident: 03/09/2012, Arbitrator: Justin Leamy, Amount in Dispute: \$1,000.00, Hearings: 08/20/2018 9:00 AM, Dates of Service: 06/26/2016 - 06/26/2016, Insurer claim No.: 06871147, Applicant File No.: None.

At the bottom of the page, there is a "Tasks" menu with a dropdown arrow. The "Review Technical Correction" task is highlighted in a red box. Below the tasks, there are two system-generated messages:

- 07/19/2018, AAA (System) sent Award Letter notification to Testing Insurance Company
- 07/19/2018, AAA (System) sent Notice of Hearing notification to Testing Insurance Company

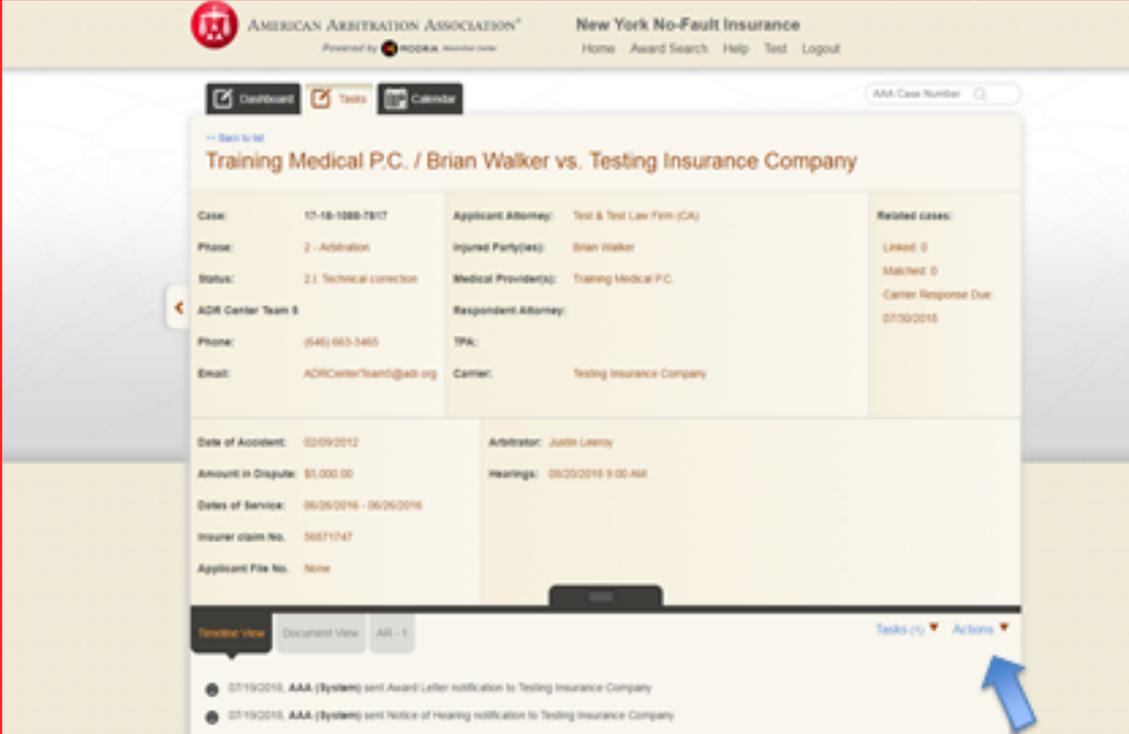
## TASKS

Depending on the task selected, a pop-up window will appear, and will assist you with completing the task.



## ACTIONS

**Actions** are activities that can be done on a case but, unlike **Tasks**, **Actions** are not triggered by another user. Instead, **Actions** must be initiated by the user.



The screenshot shows the AAA Case Management System interface. At the top, it displays the American Arbitration Association logo and the case title "New York No-Fault Insurance". Below the header, there are navigation tabs for "Dashboard", "Tasks", and "Calendar". The main content area shows the case details for "Training Medical P.C. / Brian Walker vs. Testing Insurance Company". The details are organized into several sections:

- Case Information:** Case: 17-18-1088-7817, Phase: 2 - Arbitration, Status: 2.1 Technical correction, ADR Center Team 8, Phone: (646) 663-3460, Email: ADRCenterTeam8@adr.org.
- Attorney Information:** Applicant Attorney: Test & Test Law Firm (CA), Injured Party(ies): Brian Walker, Medical Provider(s): Training Medical P.C., Respondent Attorney: TPA, Carrier: Testing Insurance Company.
- Related Cases:** Linked 0, MACHNE 0, Carrier Response Due: 07/30/2018.
- Accident and Dispute Details:** Date of Accident: 02/05/2012, Amount in Dispute: \$1,000.00, Dates of Service: 06/26/2016 - 06/26/2016, Insurer claim No.: 56871747, Applicant File No.: None.
- Arbitration Details:** Arbitrator: Justin Leamy, Hearings: 08/22/2018 9:00 AM.

At the bottom of the case details section, there are tabs for "Timeline View", "Document View", and "All - 1". To the right of these tabs, there are dropdown menus for "Tasks (0)" and "Actions". A blue arrow points to the "Actions" dropdown menu.

## ACTIONS

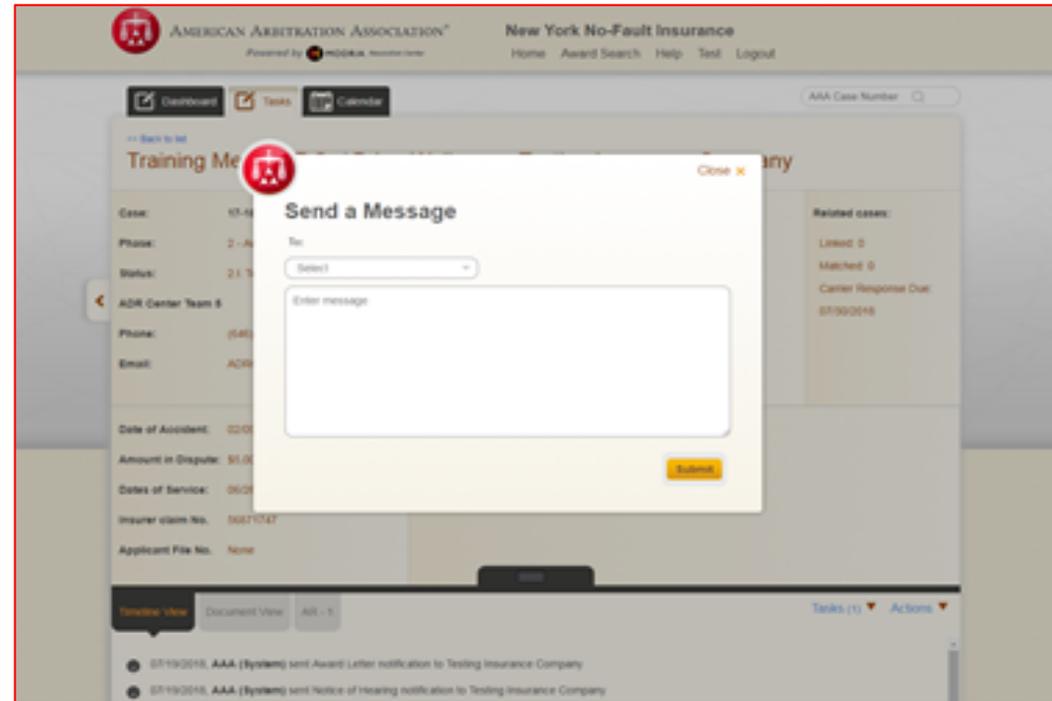
As with **Tasks**, hovering your mouse over the **Actions** menu will reveal a list of actions that can be taken on particular case. **Actions** available on a case will also be dependent on the case's Phase and Status and your role on the case (i.e. Applicant or Carrier/Respondent).

Click on an action you want to perform from the list, and ADR Center will guide you on how to complete it. Certain **Actions** taken may cause additional **Tasks** to be triggered for a particular user to review and/or complete.

The screenshot shows the AAA New York No-Fault Insurance portal. The case title is "Training Medical P.C. / Brian Walker vs. Testing Insurance Company". The case number is 17-18-1088-7817. The phase is "2 - Arbitration" and the status is "2.1 Technical correction". The applicant is "ADR Center Team 8" and the respondent is "Testing Insurance Company". The date of accident is 02/09/2012, and the amount in dispute is \$5,000.00. The dates of service are 06/05/2016 - 06/06/2016. The insurer claim number is 56871747. The applicant file number is None. The arbitrator is Justin Leony, and the hearing is on 06/05/2016 at 9:00 AM. The page also shows a list of actions: "Abeyance Request", "Send Message", and "Withdraw Case".

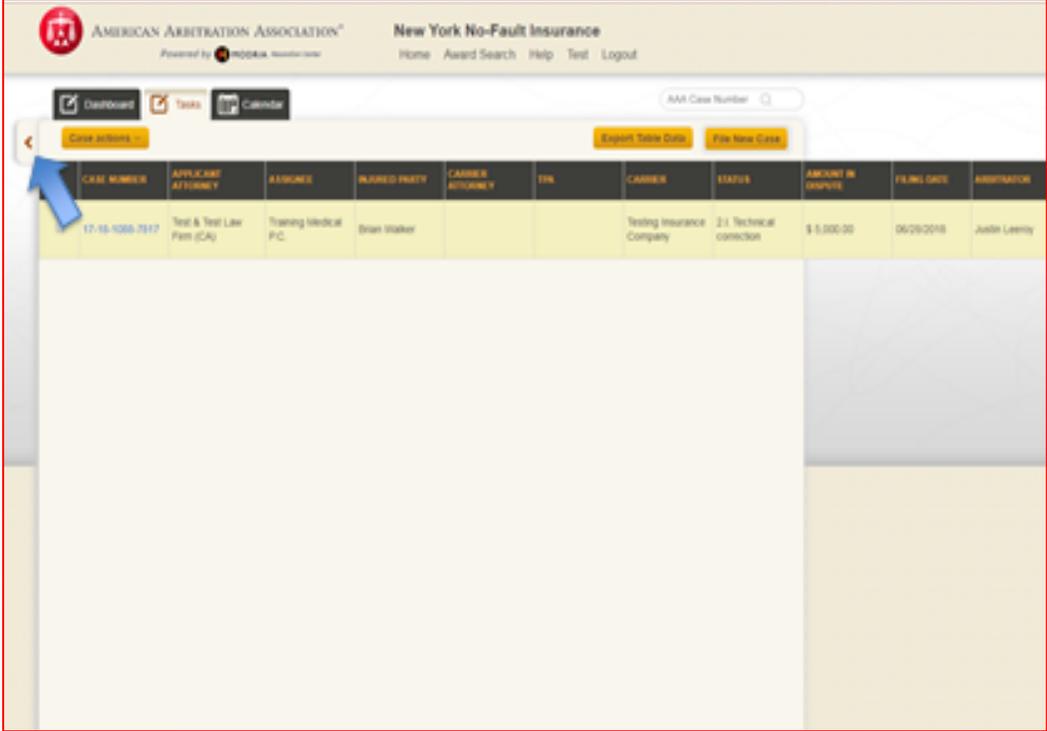
## ACTIONS

Again, depending on the action selected, a pop-up window will appear to assist you with completing the action.



## FILTER YOUR VIEW

You also have the ability to filter your view of cases by pending tasks due. From your user home page, click on the arrow tab on the left to access the case filtering options.



The screenshot displays the user interface for the American Arbitration Association's New York No-Fault Insurance portal. At the top, the logo and name of the American Arbitration Association are visible, along with the text "Powered by MODAK" and "New York No-Fault Insurance". Navigation links for "Home", "Award Search", "Help", "Test", and "Logout" are present. Below the header, there are tabs for "Dashboard", "Tasks", and "Calendar". A search bar labeled "AM Case Number" is located on the right. A blue arrow points to a left-pointing arrow icon on the left side of the table, which is used to access filtering options. The table below has the following columns: CASE NUMBER, APPLICANT ATTORNEY, ASSIGNED, INURED PARTY, CLAIMS ATTORNEY, INS, CLAIMER, STATUS, AMOUNT IN DISPUTE, FILING DATE, and ARBITRATOR. A single row of data is visible:

CASE NUMBER	APPLICANT ATTORNEY	ASSIGNED	INURED PARTY	CLAIMS ATTORNEY	INS	CLAIMER	STATUS	AMOUNT IN DISPUTE	FILING DATE	ARBITRATOR
17-16-1086-7517	Test & Test Law Firm (CA)	Training Medical P.C.	Brian Walker			Testing Insurance Company	2.1 Technical correction	\$ 1,000.00	06/28/2018	Justin Leamy

## FILTER YOUR VIEW

The tab will expand and a list of any pending tasks on your cases will be displayed at the top. To filter your cases by a specific pending task(s), simply check on the corresponding task(s) from the list.

Once you have selected the task(s) by which you want to filter, click SEARCH and the home page will filter and update to display only cases that have those particular task(s) due. From there, click on the case record you want to access.

The screenshot shows the AAA New York No-Fault Insurance portal. The left sidebar has a 'Tasks' tab selected, which is expanded to show a list of tasks. A blue arrow points to this tab. The main content area displays a table of cases. The table has the following columns: CASE NUMBER, APPLICANT ATTORNEY, ASSIGNEE, INJURED PARTY, CARRIER ATTORNEY, TPA, CARRIER, STATUS, and AMOUNT IN DOLLARS. The first row of data shows: 17-05-1088-7817, Test & Test Law Firm (CA), Training Medical P.C., Brian Visher, [blank], [blank], Testing Insurance Company, 21 Technical collection, and \$ 5,000.00. At the top of the page, there is a search bar labeled 'AAA Case Number' and a 'SEARCH' button. The page title is 'New York No-Fault Insurance' and the logo of the American Arbitration Association is visible in the top left corner.



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