

AMERICAN ARBITRATION ASSOCIATION®



ADR CENTER/ NEW YORK NO-FAULT USER GUIDE VERSION 1

© 2016 American Arbitration Association, Inc. All rights reserved. These materials are the copyrighted property of the American Arbitration Association (AAA). Any unauthorized use or modification may violate copyright laws and other applicable laws. Please contact our Customer Service Department at 917.438.1660 or email nysinsurance@adr.org for additional information.



TABLE OF CONTENTS

Account Management	1
How to Login & Logout	2
Your Profile Information	3
Your Company Information	5
Adding/Removing Authorized Users.....	7
Adding/Removing Authorized Agents	9
Payment Information.....	11
Home Page/Case Record	14
How to Use the Filters Tab.....	15
How to Access a Case Record	20
Timeline View	23
Document View	25
Viewing Documents	28
Document Actions	31
Late Documents.....	33
Upload & View Documents.....	34
AR-1.....	36
Tasks and Actions Overview	37
Tasks and Actions.....	38
First Time Form	42
Send Message	46
Review Message	48
Extension Request	50
Making a Settlement Offer	52
Retracting a Settlement Offer.....	54
Reviewing a Settlement Offer.....	55
Accepting a Settlement Offer or Counteroffer.....	57
Rejecting a Settlement Offer or Counteroffer	58
Making a Counteroffer.....	59
Appoint a Law Firm	60
Withdraw a Case.....	63



Request Technical Correction of Award	66
Review Technical Correction	69
Abeyance by Agreement Request.....	72
Calendar	75
Dashboard.....	82
Dashboard Categories.....	85
Award Search	86
General Information	90
Case Status Glossary	91



ACCOUNT MANAGEMENT

Login & Logout – provides step by step instructions on how to sign in and out of ADR Center. It also demonstrates how to reset a forgotten password.

Your Profile information - contains instructions on how to update contact information and how to change a user's password.

Your Company information - offers information on selecting the company's notification preference and adding recipients for email notifications. In this category, you will also find:

- **Adding/Removing Authorized Users** - a company has the ability to add AUTHORIZED USERS to its account in order to grant internal users access to their NY No-Fault cases. The ability to add/remove users will be given to the ADMIN person (s), as designated by that company. A company can set multiple users to be an "ADMIN", if needed. This guide also has information on setting the user's password.
- **Adding/Removing Authorized Agents** – the Carrier/Insurer can add or remove authorized agents such as an attorney's office or Third Party Administrator (TPA) to their ADR Center account. Adding an authorized attorney will allow the Carrier/Insurer to designate that attorney as the representative on any current or future cases. Adding an authorized TPA will assist the Applicant as well as the AAA in verifying that a TPA is an authorized representative to that Carrier/Insurer on a case that has been filed. Authorized Agents must already have an existing ADR Center account in order to be added as an authorized agent to a Carrier/Insurer account. Adding or removing an authorized agent to a Carrier/Insurer's account can only be done by the designated "ADMIN" person for the Carrier/Insurer (or the AAA). If there are subsidiary accounts listed under the Carrier/Insurer's Parent (main) account, adding/removing authorized agents must be done by ADMIN's registered to those subsidiary accounts or by the AAA only.

Payment information – this tab contains a summary of case transactions and tracks financial information for the user's company.



HOW TO LOGIN & LOGOUT

From ADR Center’s home/landing page, click “**Login**” at the top. Once logged in, you will be taken to your user home page and can begin managing your cases.

Modria Resolution Center Login

Email

Password

Submit [Forgot Password?](#)

You will get a modal window asking you to enter your login credentials. Enter your registered email address and password, then click “**Submit**”.

If you forgot your password, click “**Forgot Password?**”

Request a Password Reset

Please enter your registered email address. **Email Address:**
An email will be sent, which will allow you to reset your password.

Otherwise please click [Login](#).

Submit

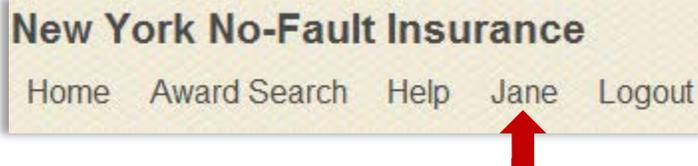
Enter your registered email address and ADR Center will send you an email containing a link to reset your password.

To logout, simply click “**Logout**” to end your session.



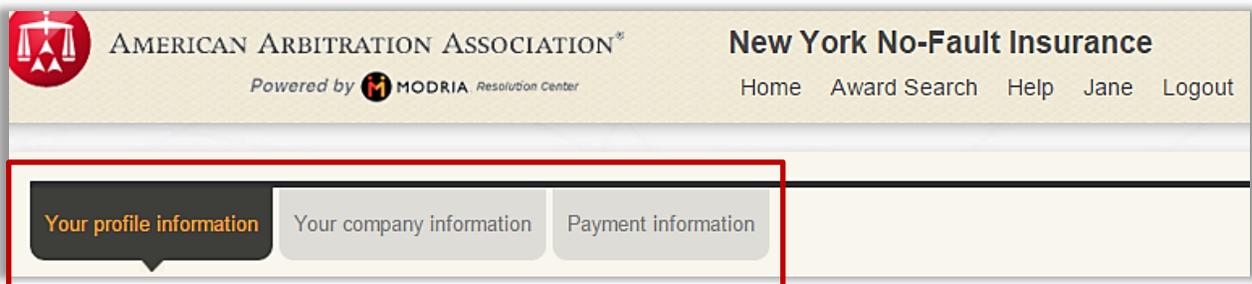
YOUR PROFILE INFORMATION

Once logged in, from your user home page, access the **MY ACCOUNT** menu by clicking on the link with your corresponding user name (left of “Logout”). The **MY ACCOUNT** link menu is displayed by the user’s name.



In the **MY ACCOUNT** section, there will be three tabs that you can access.

- “**Your profile information**” – this tab contains your contact information.
- “**Your company information**” – this tab contains information regarding your company, if any.
- “**Payment information**” – this tab contains basic financial information with regards to your cash account and No-fault arbitration filings.





In the “**Your profile information**” tab, you will be able to update your contact information. Click on a field that you want to edit or change and click “**Save**” when completed.

User Information

Are you associated with a company? No Yes

Ms Mr

First Name	Last Name
Jane	Doe
Email Address	Phone Number
test@adr.org	111-111-1111
Fax :	

PLEASE NOTE: You will be able to change or update your email address by editing the data contained in the “**Email Address**” section. This will change your login name to the updated or changed email address that you have edited.

You can also change your account password—click “**Submit**” when the change has been made.

Change Password

Current Password

New Password

Confirm Password



YOUR COMPANY INFORMATION

If you are the designated Administrator for your company, you will have the ability to add authorized users to the account in the “**Your company information**” tab. This provides multiple users within a company (e.g. attorneys or claims representatives) the ability to access arbitration cases for their particular company. There may be multiple Administrators, or everyone listed on the company’s account may be granted Administrator privileges.

See the **ADD AUTHORIZED USERS** overview for more information on how to add authorized users.



“**Notification Preferences**” will allow you to set how you would like to receive notices regarding your cases such as Notice of Hearings, Adjournments, etc. You can elect to receive notices by email, fax, or print (regular mail). The Distribution List allows a company the option to identify multiple people who need to be copied on any **EMAIL** notices sent regarding the company’s no-fault arbitration cases, but may not need full access to the case records in ADR Center.

To add a recipient to the list, simply type in their email address. To add multiple email addresses, type each email address and separate them with a comma (DO NOT space after the comma).



If you opt to receive email notifications there are (3) categories to choose from:

“**Individual notifications**” – each notification will be sent in its own email. This option will generate more emails but will grant the recipient(s) the ability to address notifications individually.

“**Consolidated email with one attachment**” – this setting is defaulted when the email notification option is selected. In this category, all like notices generated that day, will be sent in one PDF attachment. For example: all initiation notices generated that day will be received within one email as a single PDF attachment.

“**Consolidated email with multiple attachments**” – similar to the consolidated email with one attachment, this category sends all like notices within one email—but separates each notice as an individual attachment. For example: all initiation notices generated that day will be received within one email but as separate PDF attachments. After your Notification Preferences and Distribution List have been set, click “**Save**” to apply all updates.

Notification Preferences

Receive notifications by:
EMAIL

Individual notifications Consolidated email with one attachment Consolidated email with multiple attachments

Distribution List:
testinsurer@testinsurer.com,testcompany@testcompany.com,testprovider@testprovider.com

Save



ADDING/REMOVING AUTHORIZED USERS

The following actions can only be taken by the current Admin user(s) listed on the account. Once logged into your account, from your user home page, access the **MY ACCOUNT** menu by clicking on the link with your corresponding user name (left of “Logout”). The **MY ACCOUNT** link menu is displayed by the user’s name.

Then click on the “Your company information” profile tab.

Scroll down the page to the “Authorized Users” section. To add a new user click, “Add a new user”.

AUTHORIZED USERS					
LAST NAME	FIRST NAME	EMAIL	ADMIN	IS BILLING REP	REMOVE
Jane	Examiner	testinsurer@testinsurer.com	<input checked="" type="checkbox"/>	<input type="radio"/>	Remove

[+ Add a new user](#)

Register New User

Ms Mr

First Name Last Name

Email Address

Phone Number

Address 1

Address 2

Address 3

City State Zipcode

Cancel

A modal will appear asking you to enter the additional user’s contact information. Enter their contact information and click “Submit”. **Please Note:** The additional user MUST have a valid email address.



Password Reset Request

You are resetting the password for: **levarfirm@test.com**

Please note that the link you received by email cannot be reused.

Password

must be eight characters long and include at least one number.

Confirm Password

Accept [Terms of Service](#) and [Privacy Policy](#)

An email will be sent to the new user’s email address containing a link for them to complete the user registration.

The link will take the user to the section of ADR Center to allow them to create their password.

To set a password, input at least (8) characters including a number; accept the “**Terms of Service**” and click “**Continue**” to complete the registration.

Once the password has been set by the new user, they will be taken to the ADR Center homepage and can begin accessing cases.

The user has now been added as an authorized user for the company’s account. To add more authorized users, simply click “**Add a new user**” again and repeat the process.

AUTHORIZED USERS					
LAST NAME	FIRST NAME	EMAIL	ADMIN	IS BILLING REP	REMOVE
Jane	Examiner	testinsurer@testinsurer.com	<input checked="" type="checkbox"/>	<input type="radio"/>	Remove

[+ Add a new user](#)

You also have the ability to indicate whether or not the new user will act as an ADMIN user by checking the box next to their name under the “**ADMIN**” column. This will give that user administrative rights and will allow that user to add/remove additional users, if needed.

To delete a user, simply click “**Remove**” next to that user’s name. You will receive confirmation that the user has been successfully removed.



ADDING/REMOVING AUTHORIZED AGENTS

The following actions can only be taken by the current Admin user(s) listed on the account. Once logged in, access the **MY ACCOUNT** menu by clicking on the link with your corresponding user name (left of “Logout”).

The **MY ACCOUNT** link menu is displayed by the user’s name.

- 1) Then click on the “**Your company information**” tab.
- 2) Scroll down the page to get to the “**AUTHORIZED AGENTS**” section.
- 3) Click on “**Add a new agent**”.

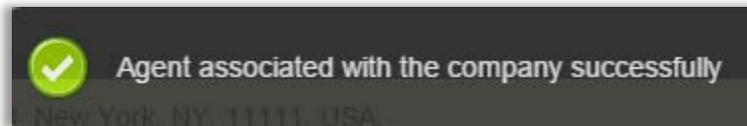


- 4) A modal will appear requesting for you to “**Select Agent Type**” and “**Type Agent Company Name**”. Click on the “**Type**” dropdown box to reveal the options.
 - Your options are “**LAW FIRM**” or “**TPA**” (Third Party Administrator). Select the one you want to add.





- 5) After the appropriate agent type has been selected, begin typing the name of the agent in the “**Name**” text box. As you type, ADR Center will propose possible name matches to select from. Simply click on the correct agent name. As previously mentioned, the agent must already have an ADR Center account. If that agent does not have an existing account, you should contact the American Arbitration Association for the agent to be added.
- 6) Once the correct name has been selected, click “**Submit**”. A modal message will advise that the agent has been successfully added to the account and can be seen in the “**AUTHORIZED AGENTS**” section. To add additional agents, click on “**Add a new agent**” and repeat the previous steps.



- 7) To remove an authorized agent, simply click “**Remove**” next to that agent’s name. That agent would be removed. A modal message will advise that the agent’s association with the company was successfully removed.

AUTHORIZED AGENTS			
COMPANY NAME	EMAIL	AGENT TYPE	REMOVE
TestLF	testlf@modria.com	LAW FIRM	Remove

[+ Add a new agent](#)



PAYMENT INFORMATION

The “**Payment information**” tab contains information regarding a user’s financial history, if applicable.

- The “**PENDING PAYMENTS**” section will indicate outstanding payments that need to be addressed such as: filing fees, adjournments, applicant frivolous filing fee, etc.
- The “**TRANSACTION HISTORY**” table will contain a chronological record reflecting payments or credits that have been completed and which case(s) is/are affected.

PENDING PAYMENTS								
DATE	CASE #	PHASE	REFERENCE #	TRANSACTION CATEGORY	FEE			
Pending Payments:		\$ 0.00						
Available Cash:		\$ 1,800.00						
TRANSACTION HISTORY								
DATE	RECEIVED DATE	CASE #	PHASE	REFERENCE #	TRANSACTION TYPE	TRANSACTION CATEGORY	PAYMENT TYPE	TRANSACTION ID
03/21/2016	03/21/2016	15-1015-5045	Concil	005217800	DEBIT	Filing (Concil)	System Auto Cash	
03/20/2016	03/20/2016	16-1016-9099	Concil	005217798	DEBIT	Filing (Concil)	System Auto Cash	
03/20/2016	03/20/2016	16-1016-9098	Concil	005217797	DEBIT	Filing (Concil)	System Auto Cash	

Please Note: This tab is only relevant to users associated with a company account and where there is a transaction history available.

Since there can be a lot of information contained in this section, you have the ability to filter through the transaction history to quickly find information. Click on the filter tab to the left of the table.

This will expand the table and provide you with a variety of filter categories. You can filter by:

- **Case Number**
- **Transaction Categories**
- **Amount Range**
- **Date Range**



Enter or select the categories you want to filter by and click “Submit”.

The image shows a sidebar on the left with filter options and a table on the right titled "TRANSACTION HISTORY".

Filter Sidebar:

- Case number: [input field]
- Transaction categories:
 - Abeyance
 - Adjournment
 - Filing (Concil)
 - Filing (Master Arb)
 - FILING PAID CLAIM
 - Increase Balance
- Amount (\$):
 - From: [input field]
 - To: [input field]
- Date:
 - From(MM/DD): [input field]
 - To(MM/DD/Y): [input field]
- Buttons: Clear, Submit

TRANSACTION HISTORY Table:

DATE	RECEIVED DATE	CASE
03/26/2015	03/26/2016	15-10
03/26/2015	03/26/2016	15-10
03/26/2015	03/26/2016	15-10
03/26/2015	03/26/2016	15-10
03/26/2015	03/26/2016	15-10
03/26/2015	03/26/2016	15-10
03/26/2015	03/26/2016	15-10
03/26/2015	03/26/2016	15-10
03/26/2015	03/26/2016	15-10

You also have the ability to export the “TRANSACTION HISTORY” table into an Excel document by clicking the “Export Table Data” button.

Note: If you have any filters applied to the “TRANSACTION HISTORY”, the “Export Table Data” will only export the information based on your filters.

The image shows a close-up of the "Export Table Data" button and the top of the table.

Export Table Data

TRANSACTION CATEGORY	PAYMENT TYPE	TRANSACTION ID
Filing		



Users who have a Cash Account will have the ability to set a **LOW FUNDS** email alert to notify them that their Cash Account balance has dropped to a certain level.

A screenshot of a web form titled "Set Low Funds Amount email alert at: ?". The form contains a text input field on the left and a yellow "Update" button on the right. A red arrow points upwards from below the "Update" button.

To set it, enter the low funds amount and click “**Update**”. Now, if your Cash Account drops down to the amount you set, an email will be sent advising you of this. If you need to add funds to your Cash Account, contact the AAA directly.



HOME PAGE/CASE RECORD

Filters Tab - provides users with the ability to organize their home page to display cases based on the filtered criteria.

Case Record - accessing a case record allows a user to retrieve case details. Within the case record, you can find case captions, related cases, timeline view, document view, and the AR-1.

Timeline View – this is the first tab in the case record, it captures all activity on a case.

Document View – allows the user to view AAA notifications and all documents submitted by either party.

AR-1 – allows the user to review the AR-1 document in its entirety.

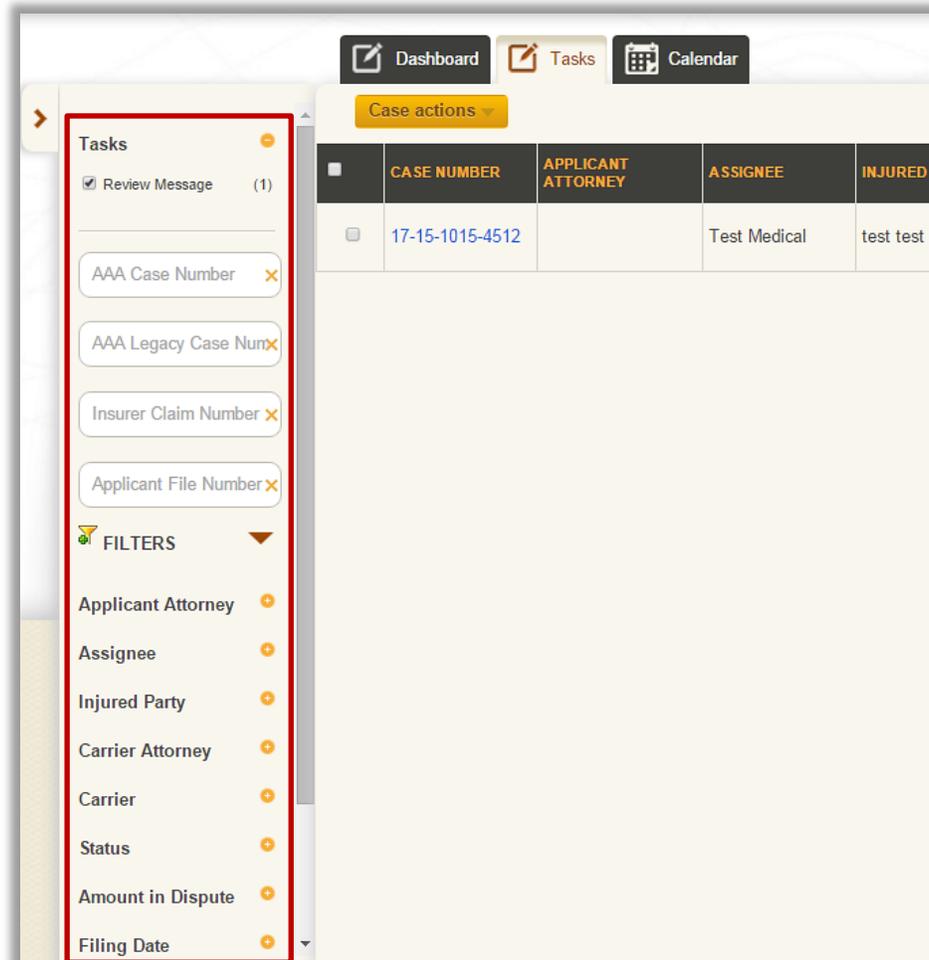


HOW TO USE THE FILTERS TAB



To begin, click on the **“Filters”** tab at the top-left section of your user home page.

***You must be within the “Tasks” tab to access the filter option. ***



The tab will expand to provide you with various filter options to view your cases.

The **“Filters”** tab will display any pending **“Tasks”** that you have within your cases. The number in parenthesis next to the task indicates how many of your current cases have that particular task pending.

If you want to filter your cases by pending tasks, simply select the task option.



AAA Legacy Case NumX

Insurer Claim Number X

Applicant File Number X

FILTERS

- Applicant Attorney
- Assignee
- Injured Party
- Carrier Attorney
- Carrier
- Status
- Amount in Dispute
- Filing Date
- Arbitrator
- Hearing Date/Time
- Underwriting Company

Reset Filters Search

	CASE NUMBER	APPLICANT ATTORNEY	ASSIGNEE	INJURED PARTY	CARRIER ATTORNEY
	17-15-1015-4512		Test Medical	test test	

Scroll down the “Filters” tab and then click “Search”.

Your case grid will filter to display cases that only have the selected task that is pending.

You also have the ability to filter your cases by specific case attributes. The available filter options correspond to the columns in your case grid.

Applicant Attorney +

Assignee -

Select Assignee

Injured Party +

Carrier Attorney -

+ Add

Carrier +

Click on any of the circle icons to expand a specific case attribute.

Once the selected attribute is expanded, click “Add”. In this example, we want to filter cases involving a specific “Assignee”.

A text box will appear to allow you to type in a specific entry. As you begin to type, the auto-predict feature will propose possible matches for you to select.

Once the information has been entered, click “Add”.



The name is now set in the filter options. If you want to add additional names, click “**Add**” again and repeat the previous steps.

The additional name is now added.



Now that the name has been added, check the box to the left of the selection, and then click “**Search**”.

The screenshot shows the main application interface. On the left, there is a sidebar with search filters. Under the 'ASSIGNEE' filter, 'Test Medical' is selected with a checkbox, and a '+ Add' link is visible below it. The main area displays a table with the following data:

	CASE NUMBER	APPLICANT ATTORNEY	ASSIGNEE	INJURED PARTY	CARRIER ATTORNEY	CARRIER
<input type="checkbox"/>	17-15-1015-4512		Test Medical	test test		Test Insurance Carrier

The case grid will now only display cases involving that particular Assignee. This filter process will work in the same manner if the other filter options are selected.



The screenshot shows a sidebar on the left with search and filter options. The filter sidebar is expanded, showing a list of filter categories. The 'Assignee' and 'Injured Party' filters are highlighted with a red box. The main table has the following data:

CASE NUMBER	APPLICANT ATTORNEY	ASSIGNEE	INJURED PARTY
17-15-1015-4512		Test Medical	test test

This filter process will work in the same manner if the other filter options are selected, with the exception of **INJURED PARTY & DATES**, for example: **filing date and hearing date/time**. In these fields, after entering the information, simply click **“Search”**.

The filter tabs also allows you to utilize a combination of filter options. It allows you to filter your cases by multiple tasks and/or case attributes.

In this example, the case grid was filtered to show cases involving a specific Applicant Attorney with a specific Assignee.

The screenshot shows a dashboard with search filters on the left and a table of cases. The 'Applicant Attorney' and 'Assignee' filters are highlighted with a red box. The table has the following data:

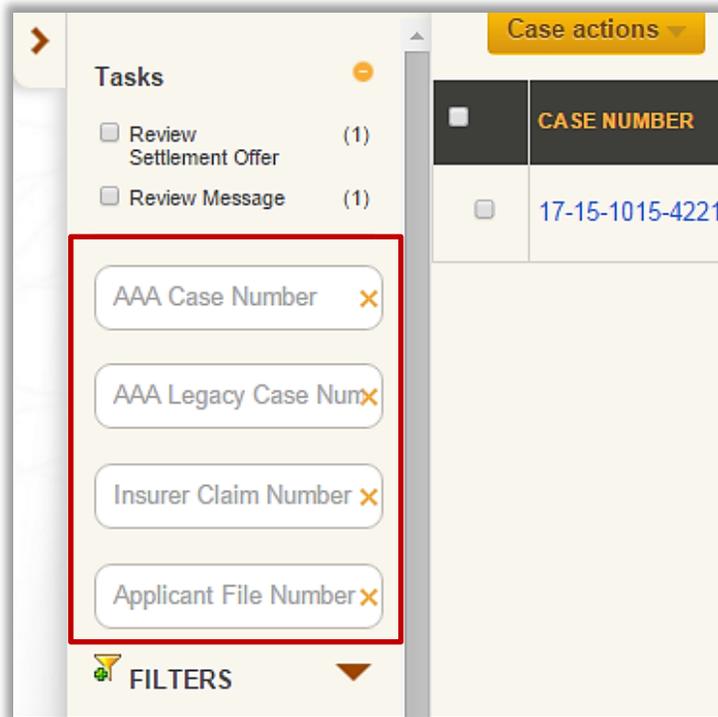
CASE NUMBER	APPLICANT ATTORNEY	ASSIGNEE	INJURED PARTY	CARRIER ATTORNEY	CARRIER	STATUS
41-15-1015-4436		Test Medical	test test		Test Insurance Carrier	4.c. Administratively closed



To reset the filters to the original view, click **“Reset Filters”**.

The case grid will reset to the original view of all your cases.

Please Note: Using the filtering tab will not permanently change how your cases will be displayed. If the page is refreshed after the filters have been applied, the grid will reset back to the original view. The same applies if you log out and log back in, go to the Home page, or if you jump from one page to another.



You can search for cases by the specific **“AAA Case Number”**, **“AAA Legacy Case Number”** (this only applies to case numbers that were used in the AAA’s ECF for Parties system), **“Insurer Claim Number”**, or **“Applicant File Number”**.

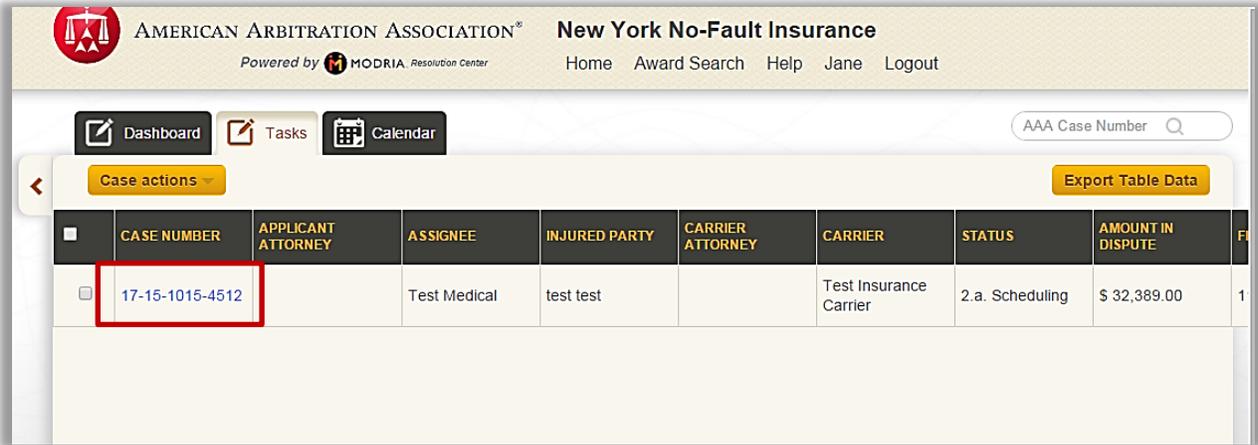
Type in the number you want to search by in one of the fields and click **“Search”**.

Once you click search, ADR Center will take you directly into that case record.



HOW TO ACCESS A CASE RECORD

From your user home page, access a case record by clicking on the **“CASE NUMBER”**. Holding the Ctrl key and then clicking on the case number will allow you to open the case in another screen tab.



Within the case record you will see the case caption, which displays the parties on the case. The details of a case are listed below the case caption.

The case details contain the following information:

- AAA case number
- Phase – this indicates which stage of the no-fault arbitration process a case is in (i.e. Conciliation, Arbitration, Award, etc.)
- Status – this indicates what is currently occurring on the case with the Phase
- ADR Center Team – lists the handling team and their contact information
- Date of Accident
- Amount in Dispute
- Dates of Service
- Insurer claim No.
- Applicant File No.
- Injured Party
- Applicant – this could be the injured party themselves or a medical provider
- Applicant Attorney (if any)
- Respondent
- Respondent Attorney (if any)
- Arbitrator (if appointed)
- Hearing Date & Location (if scheduled)
- Related cases – refers to any other case(s) that is/are linked/matched to the current case
- Due Date – refers to due date of the Defense by the Carrier/Respondent



AMERICAN ARBITRATION ASSOCIATION® **New York No-Fault Insurance**
 Powered by MODRIA Resolution Center Home Award Search Help Jane Logout

Dashboard Tasks Calendar AAA Case Number Q

<< Back to list
Test Medical / test test vs. Test Insurance Carrier

Case: 17-15-1015-4512	Applicant: Test Medical	Related cases: Linked: 0 Matched: 0 Carrier Response Due: 12/23/2015
Phase: 2 - Arbitration	Injured Party: test test	
Status: 2.a. Scheduling	Applicant Attorney:	
ADR Center Team 8	Respondent: Test Insurance Carrier	
Phone: (646) 663-3460	Respondent Attorney:	
Email: ADRCenterTeam8@adr.org		

Date of Accident: 11/01/2015	Arbitrator: Hearings:
Amount in Dispute: \$32,389.00	
Dates of Service: 11/01/2015 - 11/02/2015	
Insurer claim No.	
Applicant File No.	

Timeline View Document View AR - 1 Tasks (1) Actions

- 11/23/2015, AAA (System) sent Message notification to Test Medical(John Med)
- 11/23/2015, AAA (System) sent Case Escalated Arbitration notification to Test Medical(John Med)
- 11/23/2015, AAA (System) sent Settlement Offer notification to Test Medical(John Med)
- 11/23/2015, AAA (System) issued the Initiation Letter to the parties

The center tab allows you to expand the case details to access more information about the parties on the case. Click the black tab to expand it.

<p>Applicant Information</p> <p>MEDICAL PROVIDER</p> <p>Full Name : Test Medical Address : a City : chn State : NY Zip Code : 13478 Email : testprovider@testprovider.com Phone : 343-434-3434 Fax :</p> <p>INJURED PARTY</p> <p>First name : test Last name : test Address 1 : test City : test State : NY Zip Code : 32423-4234 Email : Phone : Fax :</p>	<p>Carrier Information</p> <p>CARRIER Switch Address</p> <p>Full Name : Test Insurance Carrier Address : 1 Test Rd City : New York State : NY Zip Code : 11111 Email : testinsurer@testinsurer.com Phone : 111-111-1111 Fax : Underwriting Company : Self-Insured</p>
---	---

Related Cases

CASE NUMBER	APPLICANT	RESPONDENT	INJURED PARTY	DATE OF SERVICE	TOTAL AMOUNT IN DISPUTE	STATUS	LINKED / MATCHED	ARBITRATOR	AWARD
Legacy Number Legacy Number doesn't exist for this case									

The tab will expand downward to reveal the parties' contact information.



The “**Related Cases**” grid will display case numbers for other cases that are linked and/or matched to this case.

The “**Legacy Number**” section is only relevant to cases that were migrated over from the AAA’s previous system to ADR Center. It would display the old case number from the previous system.

Click the tab again to minimize it.

Below the case record, you will see three tabs:

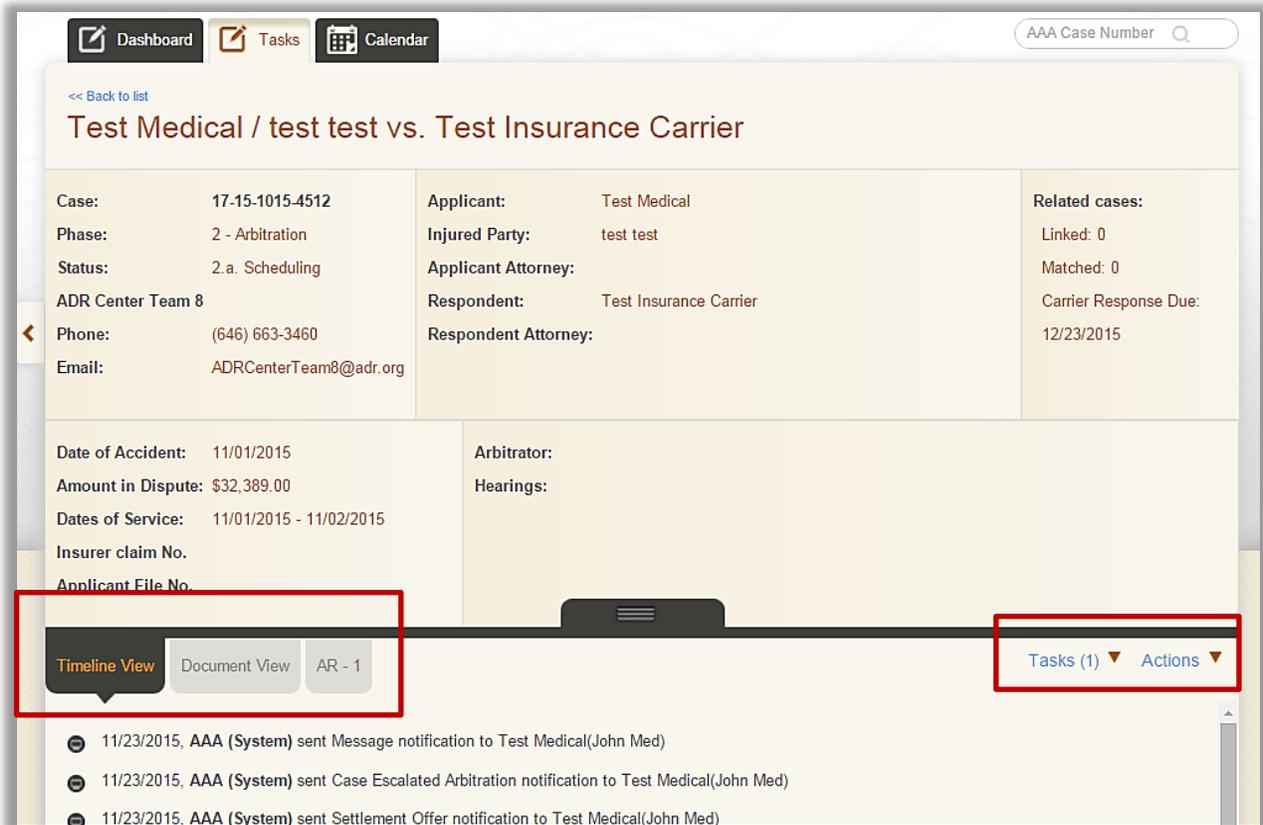
- Timeline View
- Document View
- AR-1

Each tab will provide more information in regards to the electronic case record.



TIMELINE VIEW

The first tab is the “**Timeline View**”. This tab will contain a case log of the activities that occurred on a case. The timeline will indicate what case activities took place, the date, and the user and/or company that completed the activity.



The “**Tasks**” and “**Actions**” menus are located within each case record. Refer to the **Accessing Tasks and Actions** training materials for additional information.

Certain timeline entries may have a yellow circle icon, which indicates additional information may be contained within that particular entry. Clicking the yellow icon will expand the entry to reveal more information, if any.

The **Timeline View** also has filtering options. Click on the tab to the left to reveal filtering options. The filtering options will allow you to search through the **Timeline View** to narrow the entries to specific events or text. This is helpful for identifying specific entries if the case has a significant number of timeline entries.



To filter, click on any of the categories and the **Timeline View** will show any entries pertaining to that category. You can also do a word search by entering text in the search field. This feature will allow you to search through the **Timeline View** for any entries that may contain that word.

The screenshot displays the AAA case management interface. On the left, a filter menu is highlighted with a red box, containing a search field and several checked categories: Select all, System updates, Settlement, Documents, Hearing, Dispositions, Award, and Messages. The main case details include contact information for ADR Center Team 8 and Test Insurance Carrier, along with case specifics like the date of accident (11/01/2015), amount in dispute (\$32,389.00), and dates of service (11/01/2015 - 11/02/2015). Below these details, the 'Timeline View' is active, showing a list of events. The fourth event, dated 11/20/2015, is highlighted with a red box and shows a settlement offer with a breakdown: Principal Amount (\$2.00), Interest (\$3.00), Filing Fee (\$3.00), Attorney Fee (\$3.00), and a Total Amount of \$11.00. Other events include case escalation, document indexing, and carrier acceptance.

ADR Center Team 8
Phone: (646) 663-3460
Email: ADRCenterTeam8@adr.org

Respondent: Test Insurance Carrier
Respondent Attorney:

Date of Accident: 11/01/2015
Amount in Dispute: \$32,389.00
Dates of Service: 11/01/2015 - 11/02/2015
Arbitrator:
Hearings:

Insurer claim No.
Applicant File No.

Timeline View Document View AR - 1

- 11/20/2015, AAA (Jerry Persaud) escalated the case to arbitration
- 11/20/2015, AAA (Jerry Persaud) submitted request to index documents
- 11/20/2015, Test Insurance Carrier (Jane Examiner) uploaded the Defense
- 11/20/2015, Test Insurance Carrier (Jane Examiner) submitted a Settlement Offer
 - 1 - Principal Amount: \$ 2.00
 - 2 - Interest: \$ 3.00
 - 3 - Filing Fee: \$ 3.00
 - 4 - Attorney Fee: \$ 3.00
 - 5 - Total Amount: \$ 11.00
 - Comments:
- 11/20/2015, Jane Examiner accepted as Correct Carrier



DOCUMENT VIEW

The “**Document View**” tab will house all case documents submitted by the parties to the AAA and any notices/letters sent by the AAA such as the AR-1, defense packages, initiation letter, or notices of hearings.

“**Document View**” contains information on the document type, who submitted it, and when it was submitted.

The screenshot shows a web interface for viewing case documents. At the top, there are navigation tabs for Dashboard, Tasks, and Calendar, along with a search bar for 'AAA Case Number'. The main header displays the case name: 'Test Medical / test test vs. Test Insurance Carrier'. Below this, case details are organized into three columns: Case information (Case: 17-15-1015-4512, Phase: 2 - Arbitration, Status: 2.a. Scheduling, ADR Center Team 8, Phone: (646) 663-3460, Email: ADRCenterTeam8@adr.org), Applicant information (Applicant: Test Medical, Injured Party: test test, Applicant Attorney, Respondent: Test Insurance Carrier, Respondent Attorney), and Related cases (Linked: 0, Matched: 0, Carrier Response Due: 12/23/2015). Further down, additional case details include Date of Accident (11/01/2015), Amount in Dispute (\$32,389.00), Dates of Service (11/01/2015 - 11/02/2015), Insurer claim No., and Applicant File No. (indicated by a red arrow). A navigation bar at the bottom of the details section includes 'Timeline View', 'Document View' (highlighted), and 'AR - 1', along with an 'Actions' dropdown. Below the navigation bar is a table listing documents.

SOURCE	DOCUMENT TYPE	NUMBER OF DOCUMENTS	LATE	UNREAD
AAA	Ar-1 (arbitration Request)	1		X
	Notification - Case Escalated Arbitration	1		X
	Notification - Initiation Letter	1		X
	Notification - Message	1		X
Claimant	Application document	1		X
Respondent	Defense	1		X



The documents are displayed by the following columns:

1. **SOURCE** – Shows which party the document came from.
2. **DOCUMENT TYPE** – Describes the category of the document (e.g. Medical Report, Evidence of Payment, Peer Review Report, etc.).
3. **NUMBER OF DOCUMENTS** – Indicates how many documents are contained within this “**DOCUMENT TYPE**” group.
4. **LATE** – Indicates whether or not a document submission was received late (as indicated by the red “**X**”).
5. **UNREAD** – Indicates any documents that have not yet been viewed by a user. This feature is user specific, meaning; if multiple users have access to the same case(s) the “**UNREAD**” marker (as indicated by the “**X**”) would be unique to each individual user.

SOURCE	DOCUMENT TYPE	NUMBER OF DOCUMENTS	LATE	UNREAD
AAA	Ar-1 (arbitration Request)	1		X
	Notification - Appoint LawFirm for a Case	1		X
	Notification - Case Escalated Arbitration	1		
	Notification - Initiation Letter	1		X
	Notification - Message	1		X
Claimant	Application document	1		X
Respondent	Defense	1		X
	Supplemental Document	1	X	X

Within the columns, documents are organized by the “**SOURCE**” (i.e. AAA, CLAIMANT or RESPONDENT) and the “**DOCUMENT TYPE**” (i.e. Ar-1 (arbitration Request), Defense, etc.) The “**DOCUMENT TYPE**” column contains folders that have documents of the same kind. Once the documents are indexed by the AAA, ADR Center puts documents of the same type within a folder/group.



“**DOCUMENT TYPE**” will be displayed in the following order, but will only display if that specific document type exists on the case:

1. Ar-1 (arbitration Request)
2. Application Document
3. Defense
4. Supplemental Document
5. Post Hearing Submission
6. ALL OTHER DOCUMENT TYPES WILL BE IN ALPHABETICAL ORDER

SOURCE	DOCUMENT TYPE	NUMBER OF DOCUMENTS	LATE	UNREAD
AAA	Ar-1 (arbitration Request)	1		X
	Notification - Defense File Reminder	4		X
	Notification - Initiation Letter	1		X
	Notification - Retract Settlement offer	1		X
	Notification - Settlement Offer	1		X
Claimant	Application document	1		X

The “**NUMBER OF DOCUMENTS**” column will let you how many documents are contained with this document type group. DO NOT confuse this with “number of pages”. For example, under “**Notification-Defense File Reminder**” there are 4 documents within this group.

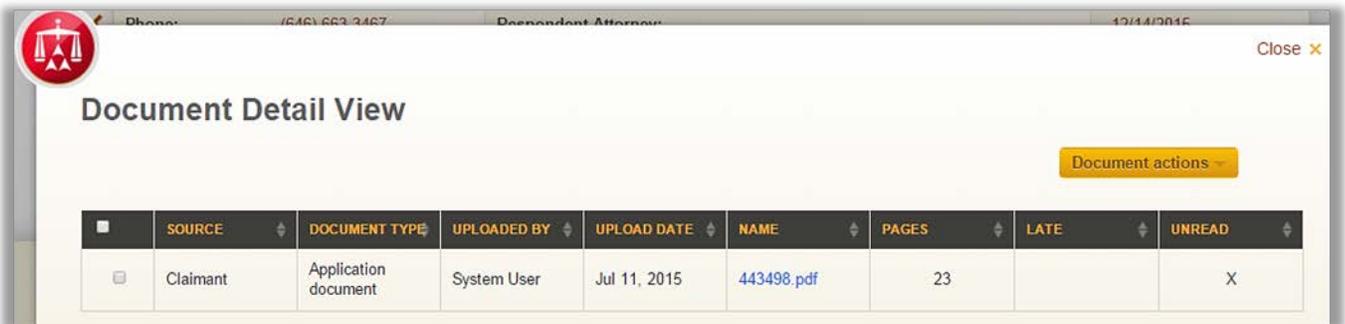


Viewing Documents

To access a document, simply click over the desired document type group. A modal window will appear called “**Document Detail View**”.

SOURCE	DOCUMENT TYPE	NUMBER OF DOCUMENTS	LATE	UNREAD
AAA	Ar-1 (arbitration Request)	1		X
	Notification - Defense File Reminder	4		X
	Notification - Initiation Letter	1		X
	Notification - Retract Settlement offer	1		X
	Notification - Settlement Offer	1		X
Claimant	Application document 	1		X

A modal window will appear called “**Document Detail View**”. This modal will display all the documents contained within the document type group. In the example below, there is 1 document contained within the “**Application document**” type that was selected. The columns headers within the modal window can be sorted by clicking the corresponding arrows next to the column name. This can be useful if the document type group contains a significant number of documents.



The screenshot shows a modal window titled "Document Detail View" with a "Close" button in the top right corner. Below the title is a "Document actions" button. A table lists document details with sortable columns indicated by arrows.

	SOURCE	DOCUMENT TYPE	UPLOADED BY	UPLOAD DATE	NAME	PAGES	LATE	UNREAD
	Claimant	Application document	System User	Jul 11, 2015	443498.pdf	23		X

To access a specific document, click on the link in the “**NAME**” column. Depending on your browser (i.e. Internet Explorer, Google Chrome, Safari, etc.) settings, the document will either open within your browser or download to your computer.



Once a document has been viewed, the “**UNREAD**” column will update and the “**X**” symbol will disappear to show that this particular document has been read (see example below). As previously mentioned, this unread feature is unique to that user and their account. So if USER-A accesses a case record and views a document, the “**X**” will disappear. If USER-B accesses that same case, they will still see that same document as “**UNREAD**”.

UNREAD DOCUMENT: “X” is shown

Document Detail View

Document actions

	SOURCE	DOCUMENT TYPE	UPLOADED BY	UPLOAD DATE	NAME	PAGES	LATE	UNREAD
<input type="checkbox"/>	Claimant	Application document	System User	Jul 11, 2015	443498.pdf	23		X

READ DOCUMENT: “X” is not shown

Document Detail View

Document actions

	SOURCE	DOCUMENT TYPE	UPLOADED BY	UPLOAD DATE	NAME	PAGES	LATE	UNREAD
<input type="checkbox"/>	Claimant	Application document	System User	Jul 11, 2015	443498.pdf	23		

HOWEVER, if at least one document within a group is “**UNREAD**”, the document group will be marked as “**UNREAD**”. This is to advise you that this document group contains a document that is still unread.



For example, the “Notification-Defense File Reminder” contains documents that are unread.

SOURCE	DOCUMENT TYPE	NUMBER OF DOCUMENTS	LATE	UNREAD
AAA	Ar-1 (arbitration Request)	1		X
	Notification - Defense File Reminder	4		X
	Notification - Initiation Letter	1		X
	Notification - Retract Settlement offer	1		X
	Notification - Settlement Offer	1		X
Claimant	Application document	1		

When accessing this group, you can see that 2 of the documents in this group are still unread.

<input type="checkbox"/>	SOURCE	DOCUMENT TYPE	UPLOADED BY	UPLOAD DATE	NAME	PAGES	LATE	UNREAD
<input type="checkbox"/>	System	Notification - Defense File Reminder	System	Nov 30, 2015	Reminder File Defense - Case 41-15-1015-4226	1		
<input type="checkbox"/>	System	Notification - Defense File Reminder	System	Dec 14, 2015	Reminder File Defense - Case 41-15-1015-4226	1		
<input type="checkbox"/>	System	Notification - Defense File Reminder	System	Dec 28, 2015	Reminder File Defense - Case 41-15-1015-4226	1		X
<input type="checkbox"/>	System	Notification - Defense File Reminder	System	Jan 12, 2016	Reminder File Defense - Case 41-15-1015-4226	1		X

Once all documents within that group have been viewed or read, the “UNREAD” symbol will disappear.

SOURCE	DOCUMENT TYPE	NUMBER OF DOCUMENTS	LATE	UNREAD
AAA	Ar-1 (arbitration Request)	1		X
	Notification - Defense File Reminder	4		X
	Notification - Initiation Letter	1		X
	Notification - Retract Settlement offer	1		X
	Notification - Settlement Offer	1		X
Claimant	Application document	1		



Document Actions

If desired, you have the ability to mark a document back to “UNREAD”. Simply check the corresponding box next to the document, and go to the “Document actions” dropdown menu. From there, select “Mark as Unread”. This can only be done within the “Document Detail View” modal and not from the main “Document View” tab.

Document Detail View

<input type="checkbox"/>	SOURCE	DOCUMENT TYPE	UPLOADED BY	UPLOAD DATE	NAME	PAGES	LATE	UNREAD
<input type="checkbox"/>	System	Notification - Defense File Reminder	System	Nov 30, 2015	Reminder File Defense - Case 41-15-1015-4226	1		
<input checked="" type="checkbox"/>	System	Notification - Defense File Reminder	System	Dec 14, 2015	Reminder File Defense - Case 41-15-1015-4226	1		
<input type="checkbox"/>	System	Notification - Defense File Reminder	System	Dec 28, 2015	Reminder File Defense - Case 41-15-1015-4226	1		
<input type="checkbox"/>	System	Notification - Defense File Reminder	System	Jan 12, 2016	Reminder File Defense - Case 41-15-1015-4226	1		

Document actions -
Mark as Read
Mark as Unread

The document is now marked as “UNREAD”, ONLY to this user.

Document Detail View

<input type="checkbox"/>	SOURCE	DOCUMENT TYPE	UPLOADED BY	UPLOAD DATE	NAME	PAGES	LATE	UNREAD
<input type="checkbox"/>	System	Notification - Defense File Reminder	System	Nov 30, 2015	Reminder File Defense - Case 41-15-1015-4226	1		
<input type="checkbox"/>	System	Notification - Defense File Reminder	System	Dec 14, 2015	Reminder File Defense - Case 41-15-1015-4226	1		X
<input type="checkbox"/>	System	Notification - Defense File Reminder	System	Dec 28, 2015	Reminder File Defense - Case 41-15-1015-4226	1		
<input type="checkbox"/>	System	Notification - Defense File Reminder	System	Jan 12, 2016	Reminder File Defense - Case 41-15-1015-4226	1		



The change will also update in the main “**Document View**” tab.

SOURCE	DOCUMENT TYPE	NUMBER OF DOCUMENTS	LATE	UNREAD
AAA	Ar-1 (arbitration Request)	1		X
	Notification - Defense File Reminder	4		X
	Notification - Initiation Letter	1		X
	Notification - Retract Settlement offer	1		X
	Notification - Settlement Offer	1		X
Claimant	Application document	1		



Late Documents

If a document was submitted late, a red “X” will appear next to that document under the “LATE” column. However, if you see this “X” in the main “Document View” tab, it DOES NOT mean that all documents contained in the group/folder are late. This means that at least 1 of the documents in that group is marked as late. Let’s look at the “Supplemental Document” document type group. It contains 2 documents.

	Medical- Progress Rpts / Treatment Notes	1	
	Nf3 - Verification Of Treatment	1	
	Table Of Contents	1	
Respondent	Defense	1	
	Supplemental Document	2	X
	Assignment / Authorization To Arbitrate Docs	2	
	Bills Submitted	1	
	Briefs Of Parties / Arguments	2	

When we open this group of documents, you will see that there are 2 documents in this group. Of those 2, one of them is marked as “LATE”.

Close

Document Detail View

Document actions

☐	SOURCE	DOCUMENT TYPE	UPLOADED BY	UPLOAD DATE	NAME	PAGES	LATE	UNREAD
☐	Respondent	Supplemental Document	Test Insurance Carrier (Jane Examiner)	Jan 29, 2016	Koala.pdf	1	X	X
☐	Respondent	Supplemental Document	Test Insurance Carrier (Jane Examiner)	Apr 07, 2016	Koala.pdf	1		X



Upload & View Documents

Within a case record, click on the “**Document View**” tab.

Once in the “**Document View**” tab, hover your mouse over the “**Actions**” menu. Select “**Upload Document**”.

SOURCE	DOCUMENT TYPE	NUMBER OF DOCUMENTS	LATE	UNREAD
AAA	Ar-1 (arbitration Request)	1		X
	Notification - Appoint LawFirm for a Case	1		X
	Notification - Case Escalated Arbitration	1		
	Notification - Initiation Letter	1		X
	Notification - Message	1		X
Claimant	Application document	1		X
Respondent	Defense	1		X
	Supplemental Document	2	X	X

Upload a Document

Select the document type

Select Document Type

- Defense
- Supplemental Submission

NOTE

The following document formats are allowed: .pdf, .jpeg, .png, .text, .doc, .docx, .xls, .xlsx, .ppt and .pptx. All documents will be converted into PDF format upon upload. The size of image files and the alignment of excel files may be automatically modified in order to generate the PDF.

Cancel

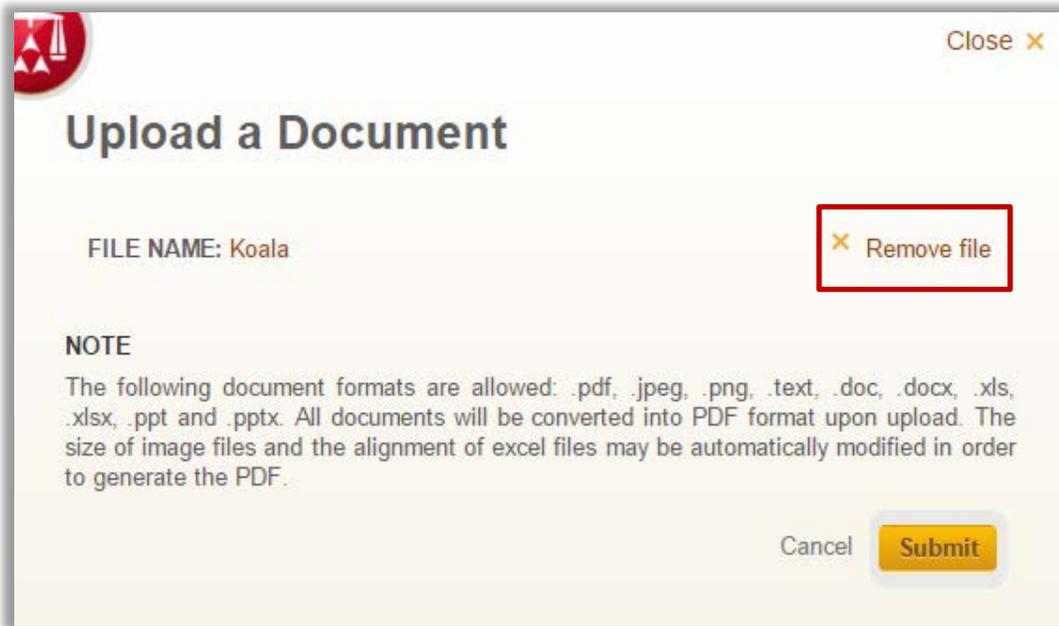
If you are a Respondent/Carrier uploading a document, you will be requested to identify what type of document you are uploading.



Select the document type that applies.

Click **“Select a file to upload”**.

Select the document you want to upload from your computer.

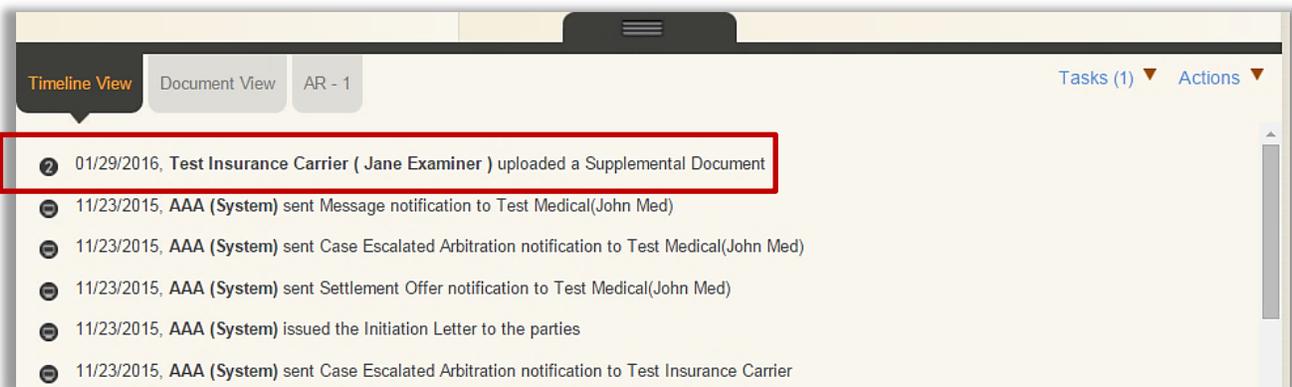


If you selected a document by mistake, click **“Remove file”** and you will be able to select another document. Otherwise click **“Submit”** to continue with the upload.

The document is now uploaded and is available and accessible in the **“Document View”** tab.

To upload additional documents, go to the **“Actions”** menu again and repeat the process.

Additionally, the **“Timeline View”** will log that a document was uploaded.



Please Note: All documents uploaded, regardless of the original format, will be converted into a PDF format.



AR-1

The “AR-1” tab contains the online version of the AR-1 form that was filed.

The online AR-1 is broken down into four sections:

- Details of Parties
- Details of the Accident
- Special Handling
- Claim Dispute

Scroll up and down the page to view more information on each section. To go to the next section of the online AR-1, click “Next” at the bottom of the page.



TASKS AND ACTIONS OVERVIEW

Tasks and Actions are functions that occur on a case, they drive a case's workflow within the No- Fault Conciliation and Arbitration process.

- ❖ First Time Form
- ❖ Send Message
- ❖ Review Message
- ❖ Extension Request
- ❖ Make a Settlement Offer
- ❖ Retract a Settlement Offer
- ❖ Reviewing a Settlement Offer
- ❖ Making a Counter Offer
- ❖ Appoint a Law Firm
- ❖ Withdraw a Case
- ❖ File a Technical Correction
- ❖ Review Technical Correction
- ❖ Abeyance Request



Tasks and Actions

The default list of cases displayed in the “**Tasks**” tab are cases that the user has a pending task to address. Otherwise, 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.

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

The screenshot displays the AAA Case Record interface for the case "Test Medical / test test vs. Test Insurance Carrier". At the top, there are navigation tabs for "Dashboard", "Tasks", and "Calendar", along with a search bar for "AAA Case Number". Below the navigation is a "Back to list" link and the case title. The main content area is divided into three columns: Case details (Case: 17-15-1015-4512, Phase: 2 - Arbitration, Status: 2.a. Scheduling, ADR Center Team 8, Phone: (646) 663-3460, Email: ADRCenterTeam8@adr.org), Applicant/Respondent information (Applicant: Test Medical, Injured Party: test test, Applicant Attorney, Respondent: Test Insurance Carrier, Respondent Attorney), and Related cases (Linked: 0, Matched: 0, Carrier Response Due: 12/23/2015). Below this is a section for "Date of Accident: 11/01/2015", "Amount in Dispute: \$32,389.00", "Dates of Service: 11/01/2015 - 11/02/2015", "Insurer claim No.", and "Applicant File No.". At the bottom, there are tabs for "Timeline View", "Document View", and "AR - 1". A red box highlights the "Tasks (1)" and "Actions" dropdown menus in the bottom right corner. The timeline shows several events from 11/23/2015, including message notifications and the issuance of an Initiation Letter.

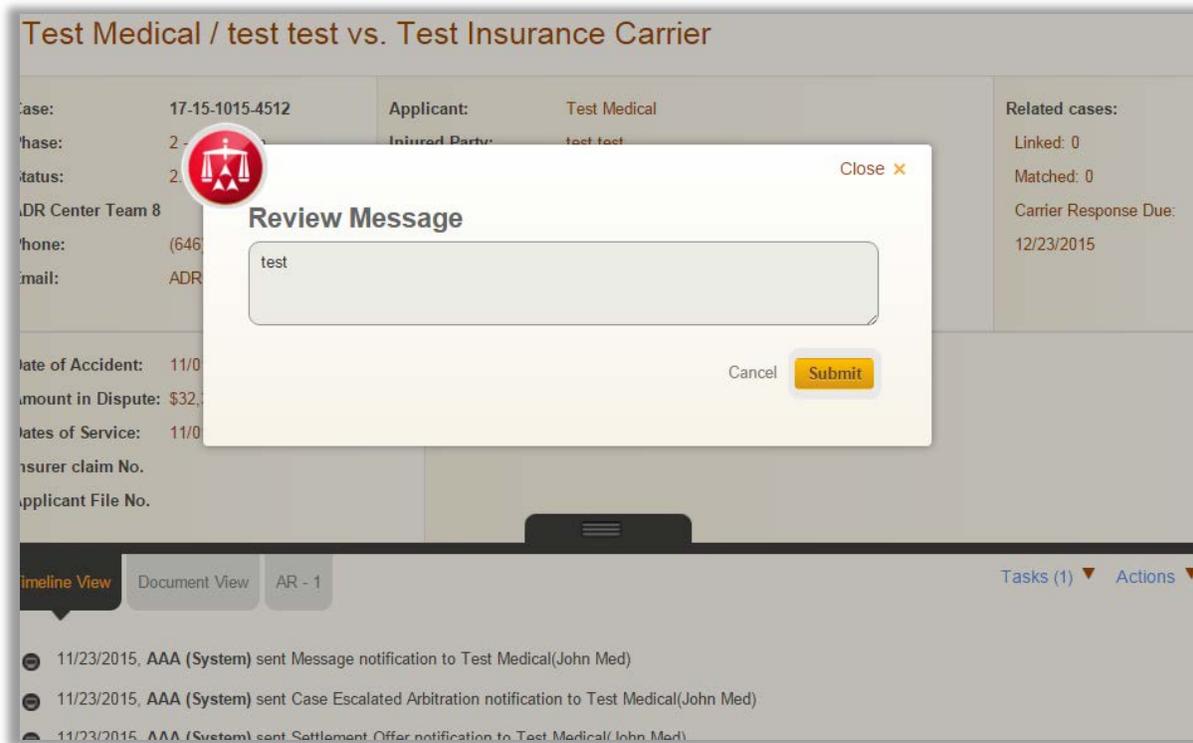
“**Tasks**” are pending actions on a case that require a specific user to review and/or complete. The number of tasks pending on the case will be indicated in parenthesis.

To access the “**Tasks**” menu, simply hover your mouse over it.

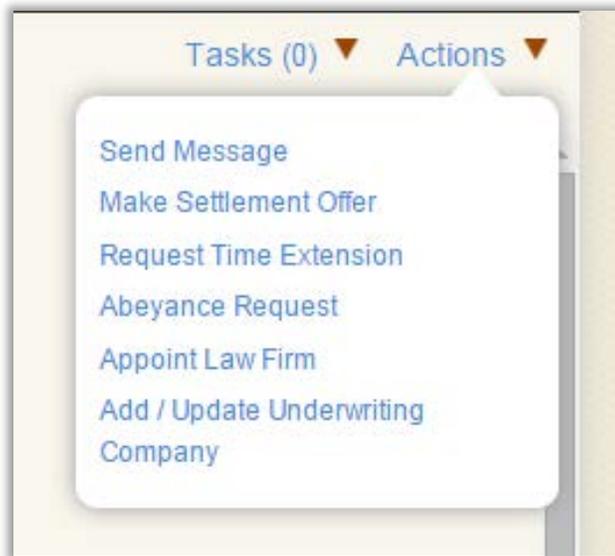


When your mouse is hovered over the **“Tasks”** menu, the menu options will appear and display any pending tasks due on a specific case. Pending tasks due on a case will be dependent on what phase and status a case is in and if there are any occurrences or milestones on a case which would cause a task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

Click on the task you want to access; depending on the task selected, a modal window will appear which will assist you with completing the task.



“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 a user.



As with “**Tasks**”, hovering your mouse over the “**Actions**” menu will reveal a list of actions that can be taken on a particular case. “**Actions**” available on a case will be dependent on the case’s phase, status and your role on the case (i.e. Applicant or Respondent).

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

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

Additionally, you have the ability to filter the view of your cases by pending tasks due. To access this filter option from your user home page, click on the arrow tab located on the left of “**Case actions**”. The tab will expand and a list of any pending tasks on your cases will be displayed. To filter your cases by a specific pending task or tasks, simply check on the corresponding task(s) from the list.



The screenshot shows the AAA Case Management System interface. At the top, there are navigation tabs for Dashboard, Tasks, and Calendar. Below these is a 'Case actions' dropdown menu. On the left side, there is a 'Tasks' sidebar with a red box around the 'Review Message (1)' task. Below the tasks are search filters for AAA Case Number, AAA Legacy Case Number, Insurer Claim Number, and Applicant File Number. Underneath these are 'FILTERS' for Applicant Attorney, Assignee, Injured Party, and Carrier Attorney. The main area displays a table of cases with the following data:

	CASE NUMBER	APPLICANT ATTORNEY	ASSIGNEE	INJURED PARTY	CARRIER ATTORNEY	CARRIER	STATUS
<input type="checkbox"/>	17-15-1015-4512		Test Medical	test test		Test Insurance Carrier	2.a. Scheduling

Once you have selected the task(s) you want to filter, click “**Search**” and the home page will filter and update to display only cases that have that particular task(s) due. Next, click on the case record you want to access.



First Time Form

“**Review First Time Form**” is a task that can be filtered from the user home page. Filter this task and select the case you want to access.

The screenshot shows a user dashboard with a sidebar on the left and a main content area on the right. The sidebar contains a 'Tasks' section with two items: 'Review First Time Form' (checked, 1) and 'Review Message' (unchecked, 1). Below the tasks are four filter input fields: 'AAA Case Number', 'AAA Legacy Case Number', 'Insurer Claim Number', and 'Applicant File Number', each with a clear 'X' button. At the bottom of the sidebar is a 'FILTERS' section with a plus icon and a dropdown arrow, and an 'Applicant Attorney' section with a plus icon. The main content area has a 'Dashboard' button and a 'Case actions' dropdown. Below these is a table with a header row 'CASE NUMBER' and one data row containing the case number '41-15-1015-4595'.

	CASE NUMBER
<input type="checkbox"/>	41-15-1015-4595



The “**First Time Form**” task will automatically appear as a modal window when a case is being reviewed for the first time. Carriers or TPAs must confirm whether or not they are the correct party on the case by completing the form. Select the appropriate option and click “**Submit**”.

If you believe you are not the carrier/respondent, select “**We are not the correct respondent**” and click “**Submit**”.

First Time Form

Applicant for benefit:	Comprehensive Medical Diagnostic Testing PC	Policy Holder:	
Injured Party:	test test	Policy Number:	32423
Carrier Named:	Test Insurance Carrier	Claim Number:	32432

The following form must be completed by the Carrier the first time one of its representatives accesses it. The purpose of this form is to make sure that any and all administrative data is in place for a smooth and efficient processing of the case.

Are you the correct Respondent for this case?

- We are the correct carrier
- We are the correct Third Party Administrator (TPA)
- We are not the correct respondent

Comments :

Enter comments

[Click to view the AR1 form](#)



Selecting either “**We are the correct carrier**” or “**We are the correct Third Party Administrator (TPA)**” will expand the modal window to reveal the section to confirm the “**Underwriting company**”.

The screenshot shows a web form with the following sections:

- Are you the correct Respondent for this case?**
 - We are the correct carrier
 - We are the correct Third Party Administrator (TPA)
 - We are not the correct respondent
- Please select the underwriting company for this claim**
 - Self Insured Carrier
- Underwriting company:**
 -
- I confirm that this is the underwriting company for this case
- Comments :**
 -

At the bottom left, there is a link: [Click to view the AR1 form](#). At the bottom right, there is a yellow **Submit** button.

If the company/carrier is SELF-INSURED simply check the “**Self Insured Carrier**” box and click “**Submit**”.

To confirm the correct underwriting company, the user can begin typing the name of the company in the “**Underwriting company**” section and ADR Center will propose possible matches to select. Alternatively, if the user knows the company NAIC number, begin typing the NAIC number and ADR Center will propose possible matches to select.

After the correct underwriting company has been selected, check the confirm box and click “**Submit**”. The comments section is optional.



Once completed, a timeline entry is logged in the case record to indicate confirmation of the underwriting company. The timeline entry will also reflect updates made to the underwriting company. The underwriting company is viewable in the case details dropdown tab.

Date of Accident: 12/01/2013
Amount in Dispute: \$205.00
Dates of Service: -
Insurer claim No. 32432
Applicant File No.

Arbitrator:
Hearings:

Timeline View | Document View | AR - 1 | Tasks (1) | Actions

- 01/21/2016, Jane Examiner accepted as Correct Carrier
- 01/18/2016, AAA (System) sent Defense File Reminder notification to Test Insurance Carrier
- 12/31/2015, AAA (System) issued the Initiation Letter to the parties
- 12/30/2015, AAA (System) created First Time Form to Carrier
- 12/30/2015, This case has been assigned to ADR Center Team 1
- 12/30/2015, System User filed this case
- 07/11/2015, System User received Offline Case (Paper Intake)

Users will have the ability to update the underwriting company if an error was made. Under the “Actions” menu, select “Add / Update Underwriting Company”.

Please select the underwriting company for this claim

Self Insured Carrier

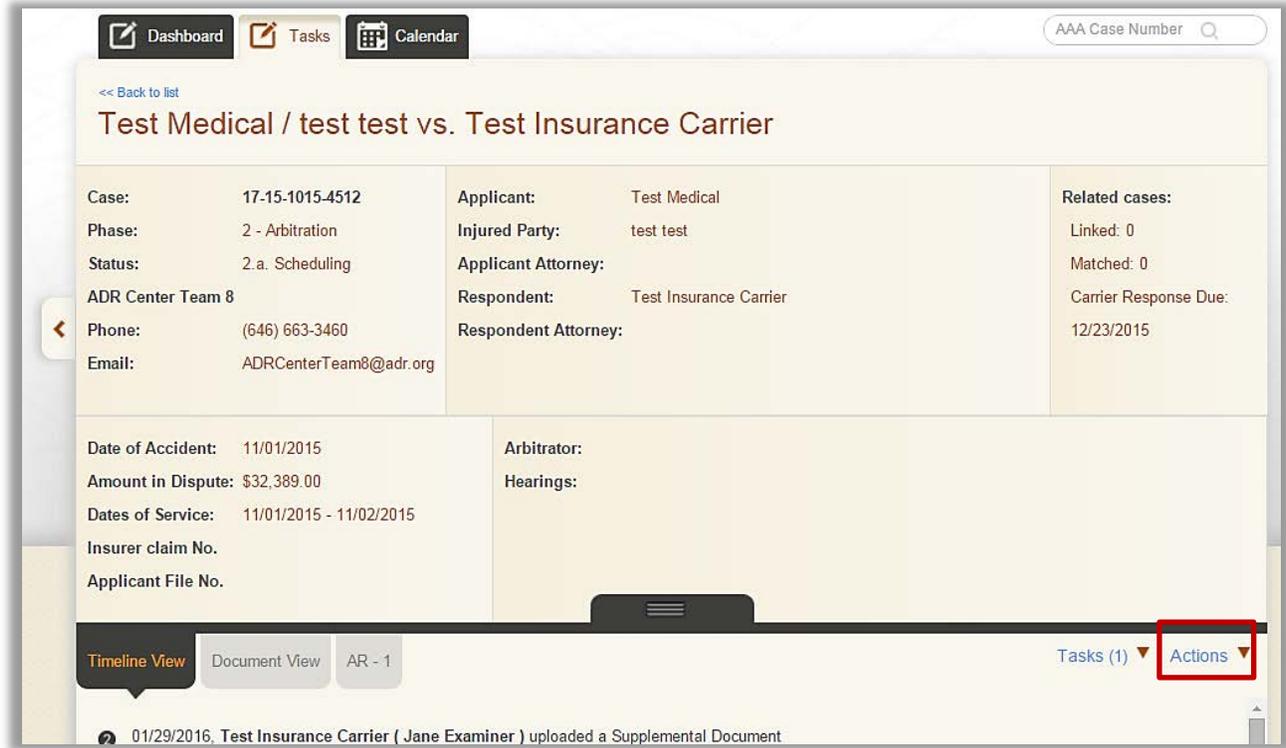
Underwriting company:

A modal window will appear to allow the user to enter the updated information. Again, the user will have the option of entering the name or entering the NAIC number. Select the underwriting company and click “Submit”.



Send Message

Within a case record, go to the “**Actions**” dropdown menu.



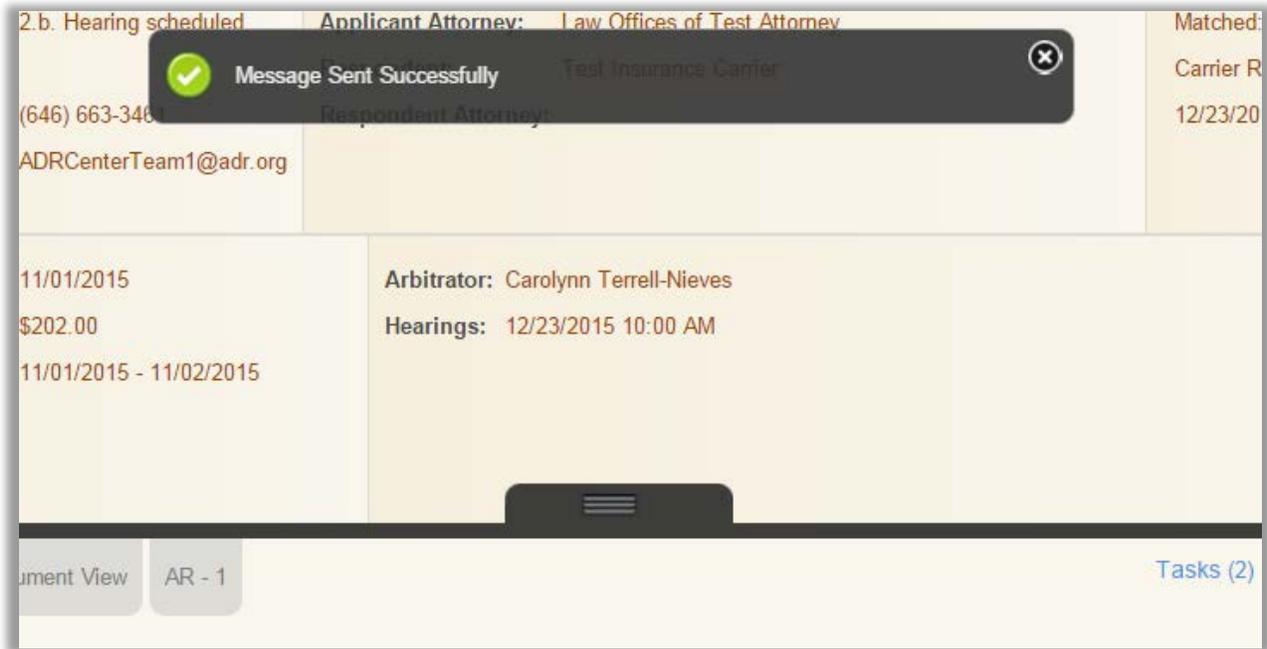
Select “**Send Message**”.

You will get a modal window that will ask you to select the recipient of the message. Your options will be based on your user role (i.e. Applicant or Carrier/Respondent).

After selecting the recipient, enter your message in the text box. Once you are done, simply click “**Submit**” to post the message.



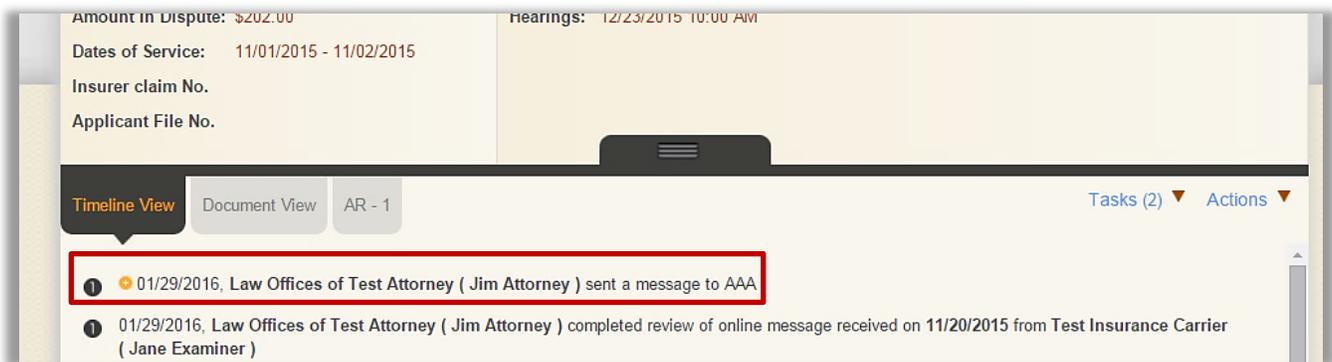
If the message was posted successfully, you will receive the “**Message Sent Successfully**” modal and the recipient will receive a notification.



This will create a “**Review Message**” task for the recipient of the message.

The message is also posted in the Timeline View. Click the yellow sign to view the message in its entirety.

The message is now part of the case record and can be viewed at any time.





Review Message

The “**Review Message**” task is triggered when a user (e.g. Applicant, Respondent/Carrier or Conciliator) posts a message to another user(s). This task is created to alert the other user that there are messages sent to them on a particular case.

“**Review Message**” is simply a task that indicates that a new message has been posted to a case for you to review. It is solely up to the recipient of the message to determine if a response is needed.

Similar to other tasks, you can filter your cases grid by the “**Review Message**” task and then select the case you would like to access.

The screenshot displays the user interface for the American Arbitration Association. At the top, there are navigation tabs for "Dashboard", "Tasks", and "Calendar". Below these is a "Case actions" dropdown menu. On the left side, there is a "Tasks" sidebar with a red box highlighting the "Review Message (1)" task. Below the sidebar are several filter input fields: "AAA Case Number", "AAA Legacy Case Nun", "Insurer Claim Number", and "Applicant File Number". A "FILTERS" section is also visible, with "Applicant Attorney" listed below it. The main area is a table with the following columns: "CASE NUMBER", "APPLICANT ATTORNEY", "ASSIGNEE", "INJURED PARTY", "CARRIER ATTORNEY", and "CARRIER". A single row is visible in the table with the following data: "17-15-1015-4512", an empty cell, "Test Medical", "test test", an empty cell, and "Test Insurance Carrier".

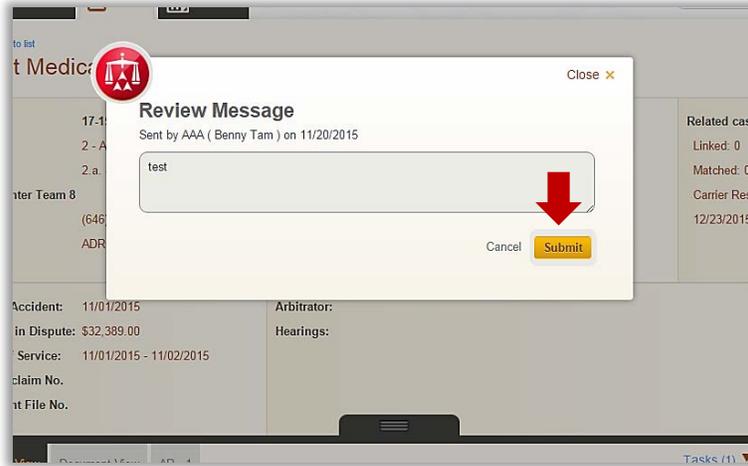
	CASE NUMBER	APPLICANT ATTORNEY	ASSIGNEE	INJURED PARTY	CARRIER ATTORNEY	CARRIER
<input type="checkbox"/>	17-15-1015-4512		Test Medical	test test		Test Insurance Carrier



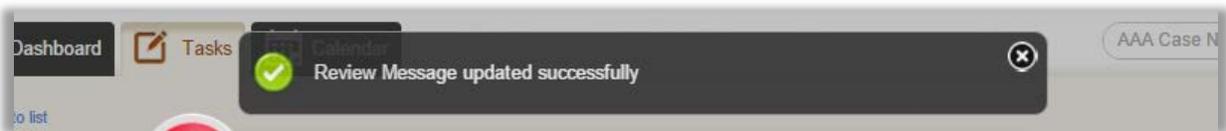
Once a case record has been selected, access the task by going to the “Tasks” menu.

Then select “Review Message”.

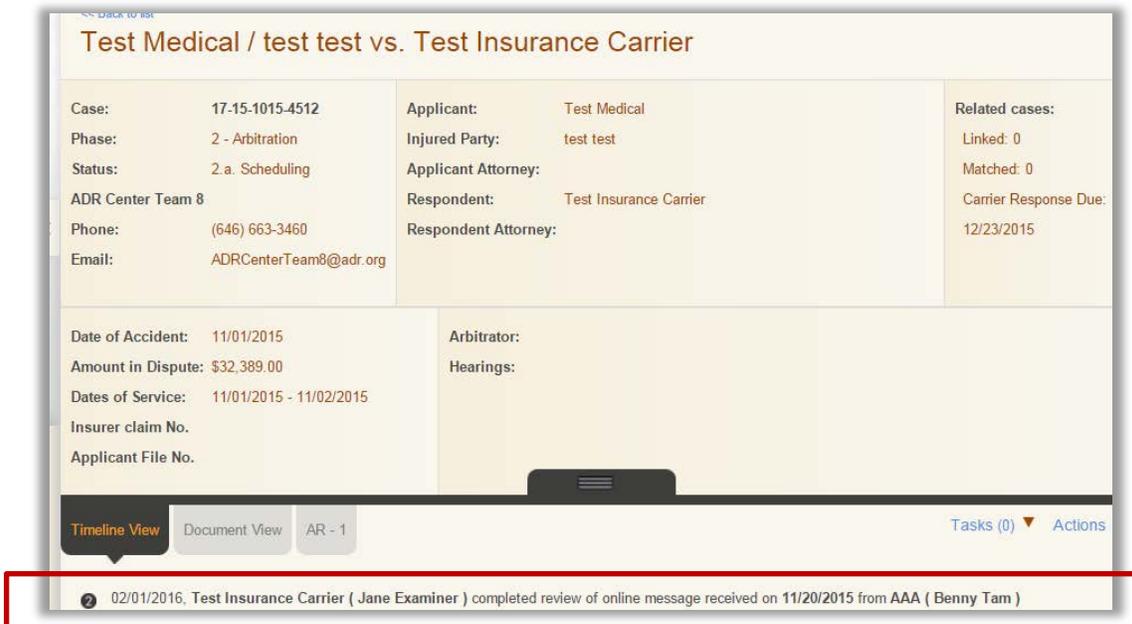
You will receive a modal window that will display the message. Once you are done reviewing the message, simply click “Submit” to complete the task.



The task has now been completed and is no longer a pending task due on the case.



The message is always viewable in the “Timeline View” tab.

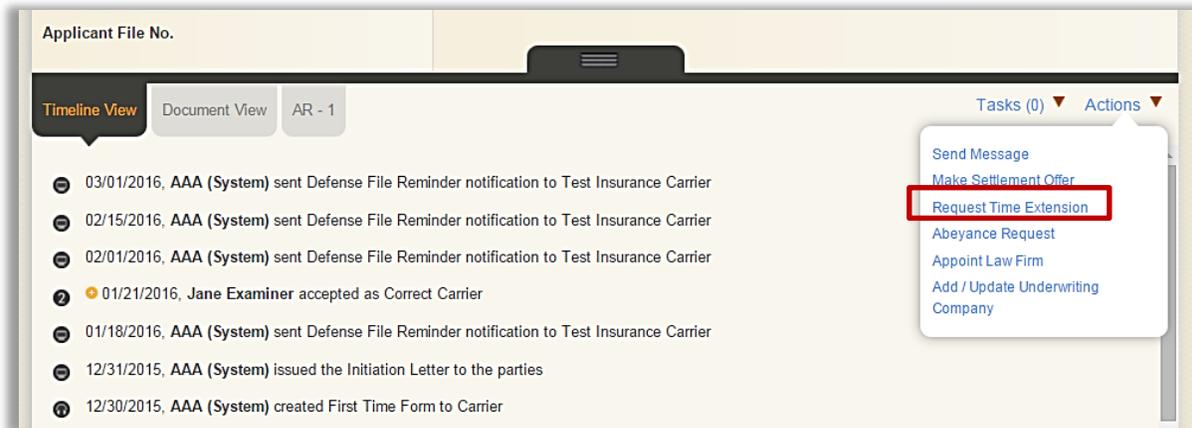




Extension Request

Begin by accessing the case record from your user home screen/page.

Within the case record, hover your mouse over the “**Actions**” menu and select “**Request Time Extension.**”



A modal window will appear and you will need to indicate how much time is being requested and the reason for the request, once completed, click “**Submit**”.

The screenshot shows a modal window titled 'Request Time Extension'. The window has a close button in the top right corner. The main content area contains the following text: 'Please note that AAA can accept or reject the time limit extension requests on a discretionary basis. We recommend that you explain in details why you need an extension.' Below this text, there is a text input field labeled 'Duration of extension requested (in days)'. Underneath that, there is a larger text area labeled 'Reason for request'. At the bottom right of the modal, there are two buttons: 'Cancel' and 'Submit'.



The request will be logged in the “**Timeline View**” and is transmitted to AAA for review and determination.

The AAA will review the request and make a determination. Notifications will be sent advising if the time extension request was accepted, accepted with a short time extension, or rejected. It will also be logged in the “**Timeline View**”. If accepted as requested, or with a shorter time extension, the notification sent will reflect the new due date of the defense submission.

Date of Accident: 12/01/2013	Arbitrator:
Amount in Dispute: \$205.00	Hearings:
Dates of Service: -	
Insurer claim No. 32432	
Applicant File No.	

Timeline View | Document View | AR - 1

- 1 04/07/2016, AAA (Jerry Persaud) accepted Time Extension request
- 2 04/07/2016, Test Insurance Carrier (Jane Examiner) submitted a Time Extension request
- 03/01/2016, AAA (System) sent Defense File Reminder notification to Test Insurance Carrier
- 02/15/2016, AAA (System) sent Defense File Reminder notification to Test Insurance Carrier



Making a Settlement Offer

As a party to a case, you can initiate a settlement offer if the case is active and does not have a settlement offer currently pending. To initiate a settlement offer, select the “**Make Settlement Offer**” option which can be found in the case’s “**Actions**” menu:

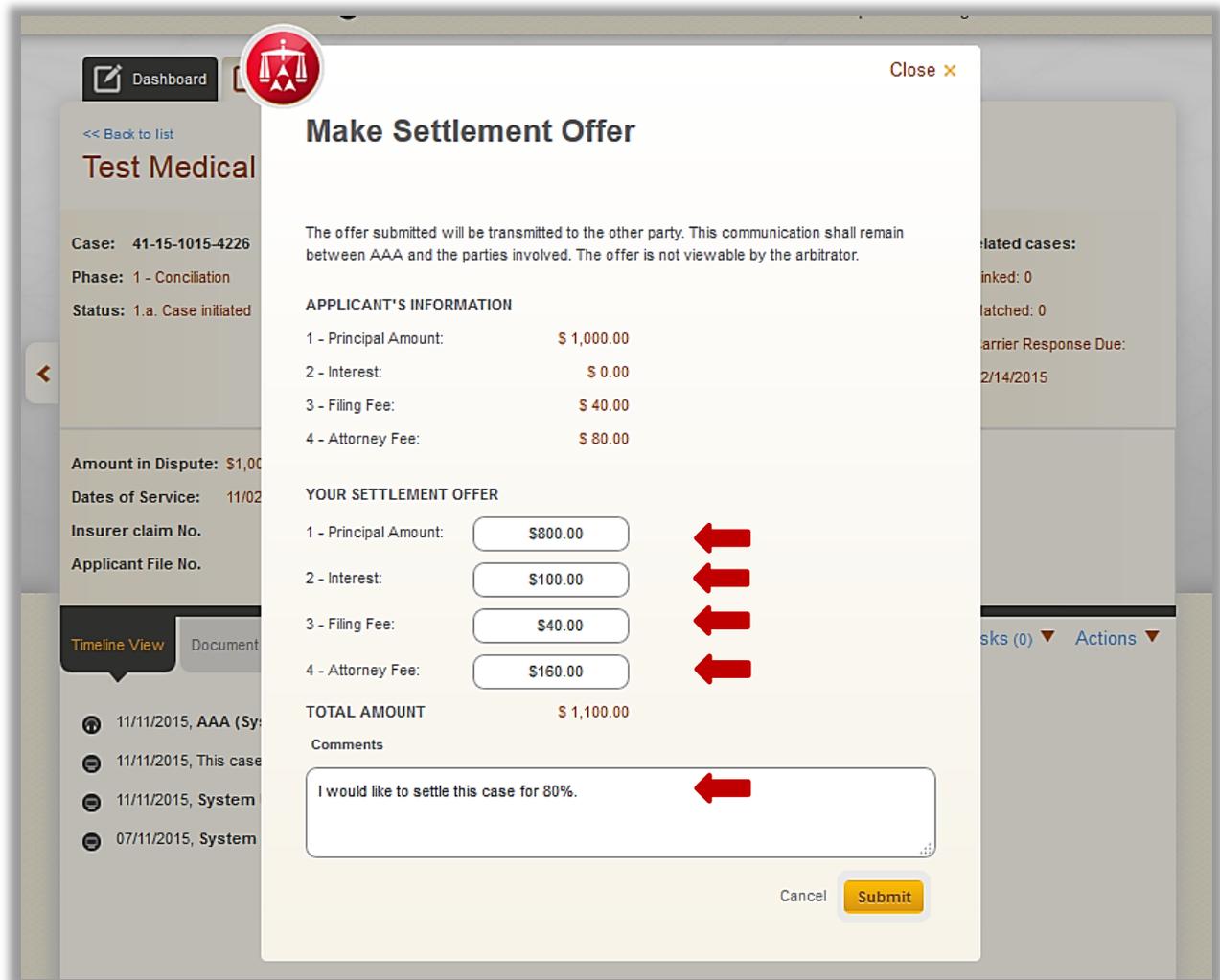
The screenshot displays the user interface for a case titled "Test Medical / Sally Hurt vs. Test Insurance Carrier". At the top, there are navigation tabs for "Dashboard", "Tasks", and "Calendar". Below these is a "Back to list" link. The case title is prominently displayed. The main area is divided into several sections:

- Case Information:** Case: 41-15-1015-4226, Phase: 1 - Conciliation, Status: 1.a. Case initiated.
- Parties:** Applicant: Test Medical, Injured Party: Sally Hurt, Applicant Attorney: Law Offices of Test Attorney, Respondent: Test Insurance Carrier, Respondent Attorney: (blank).
- Related cases:** Linked: 0, Matched: 0, Carrier Response Due: 12/14/2015.
- Financials:** Amount in Dispute: \$1,000.00, Dates of Service: 11/02/2015 - 11/05/2015.
- Other:** Arbitrator: (blank), Hearings: (blank), Insurer claim No., Applicant File No.

At the bottom, there are tabs for "Timeline View", "Document View", and "AR - 1". On the right side, there is a "Tasks (0)" and "Actions" dropdown menu. The "Actions" menu is open, showing options: "Send Message", "Make Settlement Offer" (highlighted with a red box), "Abeyance Request", and "Withdraw Case". Below the menu, a timeline shows three events from 11/11/2015: "AAA (System) created First Time Form to Carrier", "This case has been assigned to ADR Center Team 7", and "System User filed this case".



A modal will appear allowing you to enter your offer:



Once your offer has been submitted, the following will occur:

- The offer is immediately logged in the timeline.
- The opposing party will receive a “**Review Settlement Offer**” task (see **Reviewing a Settlement Offer**).
- The AAA notification letter will be sent to the opposing party the next business day advising them of the offer.



Retracting a Settlement Offer

If you extended a settlement offer that has not been accepted by the opposing party, you will have the opportunity to retract your offer. To retract a pending settlement offer, select the **“Retract Settlement Offer”** option which can be found in the case’s **“Actions”** menu.

The screenshot displays the AAA Case Management System interface for Case 41-15-1015-4226. The case title is "Test Medical / Sally Hurt vs. Test Insurance Carrier". The interface includes a navigation bar with "Dashboard", "Tasks", and "Calendar" options. The case details section shows the following information:

Case: 41-15-1015-4226	Applicant: Test Medical	Related cases:
Phase: 1 - Conciliation	Injured Party: Sally Hurt	Linked: 0
Status: 1.a. Case initiated	Applicant Attorney: Law Offices of Test Attorney	Matched: 0
	Respondent: Test Insurance Carrier	Carrier Response Due: 12/14/2015
	Respondent Attorney:	

Additional case details include:

Amount in Dispute: \$1,000.00	Arbitrator:
Dates of Service: 11/02/2015 - 11/05/2015	Hearings:
Insurer claim No.	
Applicant File No.	

The interface also features a "Timeline View" section with a list of events:

- 11/11/2015, Jane Examiner accepted as Correct Carrier
- 11/11/2015, Law Offices of Test Attorney (Jim Attorney) submitted a Settlement Offer
- 11/11/2015, AAA (System) created First Time Form to Carrier
- 11/11/2015, This case has been assigned to ADR Center Team 7

The "Actions" menu is open, showing the following options:

- Send Message
- Make Settlement Offer
- Abeyance Request
- Withdraw Case
- Retract Settlement Offer** (highlighted with a red box)

Your offer is immediately retracted once you click the menu option. The following will occur:

- The retraction is immediately logged in the timeline.
- The **“Review Settlement Offer”** task will be removed immediately from the opposing party’s tasks.
- The AAA notification letter will be sent to the opposing party the next business day advising them that the offer has been retracted.
- You will be able to re-initiate a new settlement offer on the case.



Reviewing a Settlement Offer

You will be able to identify cases for which you have been extended settlement offers through the filters panel in your **“Tasks”** tab. There are 2 tasks relating to settlement offers:

- Review Settlement Offer
- Review Counteroffer

The screenshot shows a software interface with a navigation bar at the top containing 'Dashboard', 'Tasks', and 'Calendar'. Below this is a 'Case actions' dropdown menu. On the left, a 'Tasks' sidebar lists two tasks: 'Review Settlement Offer' and 'Review Counteroffer', both with a count of (1). Below the tasks is a 'FILTERS' section with expandable options for 'Applicant Attorney' and 'Assignee'. The main content area displays a table with the following data:

<input type="checkbox"/>	CASE NUMBER	APPLICANT ATTORNEY	ASSIGNEE	INJURED PARTY	CA AT
<input type="checkbox"/>	41-15-1015-4424	Law Offices of Test Attorney	Test Medical	Mike Injured	
<input type="checkbox"/>	41-15-1015-3957	Law Offices of Test Attorney	Test Medical	Susie Crash	
<input type="checkbox"/>	41-15-1015-4226	Law Offices of Test Attorney	Test Medical	Sally Hurt	



By accessing either task, one of the following modals will appear:

Review Settlement Offer

Amount in Dispute: \$ 2,000.00

Carrier's Offer

1 - Principal Amount:	\$ 1200.00
2 - Interest:	\$ 150.00
3 - Filing Fee:	\$ 40.00
4 - Attorney Fee:	\$ 80.00
5 - Total Amount:	\$ 1470.00

Carrier Comment:
I believe this is a fair offer to settle.

Response to Offer:
Accept

Comments:
Enter comments if any

Cancel Submit

Review Counter Offer

Amount in Dispute: \$ 5,000.00

Carrier's Offer	Your Previous Offer
1 - Principal Amount:	\$ 4500.00
2 - Interest:	\$ 450.00
3 - Filing Fee:	\$ 40.00
4 - Attorney Fee:	\$ 1000.00
5 - Total Amount:	\$ 5890.00

Carrier Comment:
I can offer 80% at most.

Response to Offer:
Accept

Comments:
Enter comments if any

Cancel Submit

The “**Review Settlement Offer**” modal displays the original amount in dispute for your reference. The settlement offer terms are listed along with any comment the offerer has provided. A drop-down list with options for you to indicate **Accept**, **Reject**, or **Counteroffer** will be available.

The “**Review Counter Offer**” modal displays and behaves identically to the “**Review Settlement Offer**” modal; however, it also displays the terms of your original offer.



Accepting a Settlement Offer or Counteroffer

To accept a settlement offer, select the “**Accept**” option under “**Response to Offer**”. You can enter additional comments if needed. Once you submit your acceptance, the following will occur:

- If the case is settled during the Conciliation phase:
 - The case immediately closes as settled.
 - The acceptance is logged in the timeline.
 - The AAA notification letter will be sent to both parties the next business day with the final settlement terms.

- If the case is settled during the Arbitration phase, the Arbitrator will be notified to issue a consent award.



Rejecting a Settlement Offer or Counteroffer

To reject a settlement offer, select the “**Reject**” option under “**Response to Offer**”. You can enter additional comments if needed. Once you submit your rejection, the following will occur:

- The rejection is logged in the timeline.
- The AAA notification letter will be sent to the opposing party the next business day advising them that the offer has been rejected.
- Either party will be able to re-initiate a new settlement offer on the case.



Making a Counteroffer

To make a counteroffer, select the “**Counteroffer**” option under “**Response to Offer**”. Additional text fields will appear on the upper-right portion of the modal for you to input your counteroffer. You can enter additional comments if needed.

Review Settlement Offer

Amount in Dispute: \$ 5,000.00

Applicant's Offer		Your Counteroffer
1 - Principal Amount:	\$ 4500.00	\$4,000.00
2 - Interest:	\$ 450.00	\$400.00
3 - Filing Fee:	\$ 40.00	\$40.00
4 - Attorney Fee:	\$ 1000.00	\$800.00
5 - Total Amount:	\$ 5990.00	\$ 5,240.00

Applicant Comment:
I can settle for 90%.

Response to Offer:
Counteroffer

Comments:
I can offer 80% at most

Cancel Submit

Once you submit your counteroffer, the following will occur:

- The counteroffer is immediately logged in the timeline.
- The opposing party will receive a “**Review Settlement Counteroffer**” task immediately (see **Reviewing a Settlement Offer**).
- The AAA notification letter will be sent to the opposing party the next business day advising them of the counteroffer.

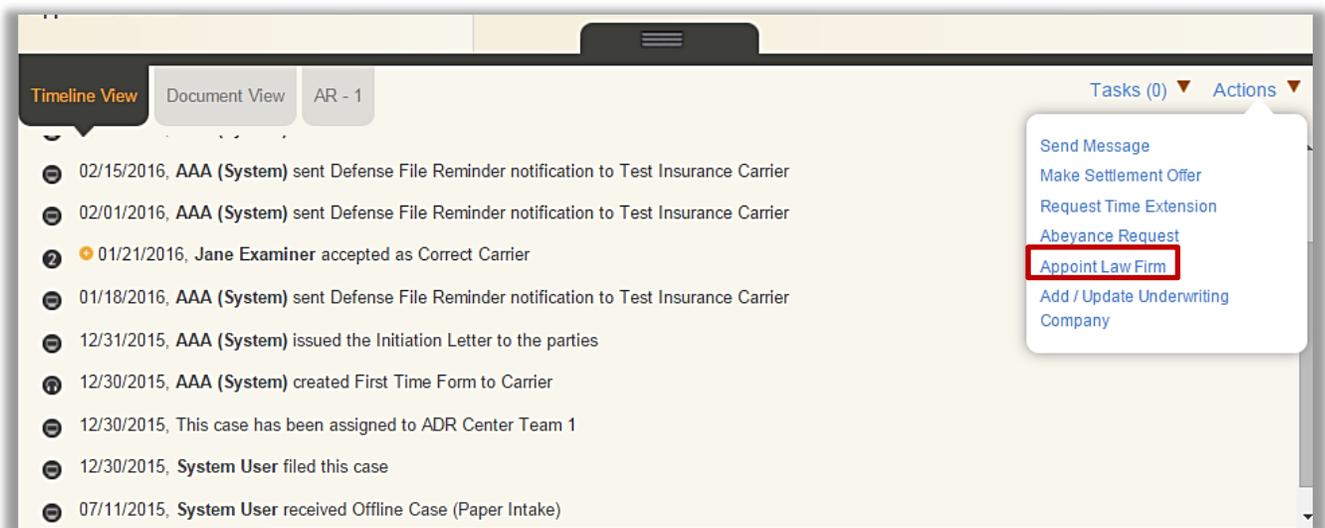


Appoint a Law Firm

“**Appoint Law Firm**” is an action that allows a Carrier/Respondent to assign a pre-authorized law firm to represent them on their case(s) through ADR Center. Once the law firm has been assigned, that law firm will be able to access the case record in ADR Center.

Prior to being able to appoint a law firm on a case, that law firm must be an added “**AUTHORIZED AGENT**” under your company account and already have an existing account in ADR Center. This can be done in the MY ACCOUNT section of ADR Center. Please refer to the **ACCOUNT MANAGEMENT** user guide for instructions on how to add AUTHORIZED AGENTS.

Within the case record, hover your mouse over the ACTIONS menu and select “**Appoint Law Firm**”.





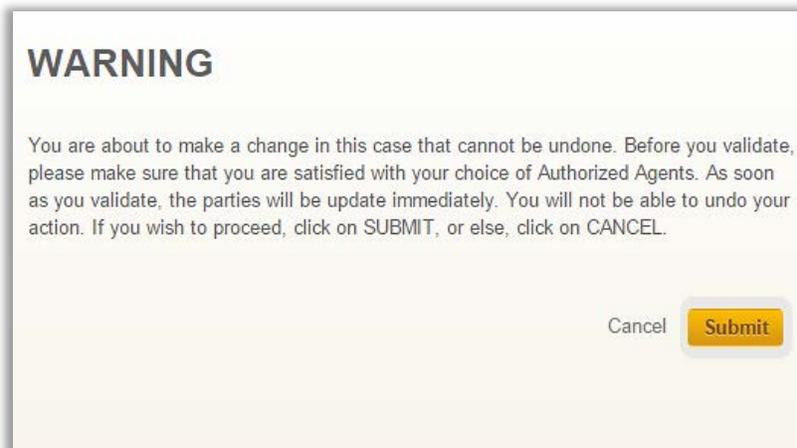
A modal window will appear to select the law firm.

Please Note: As soon as you appoint a law firm to the case, your permission to this case will be view only. You will still see this case in your case list and still have access to the case details/record, but the law firm will become the party of reference to represent you in this matter.



Select a law firm from the list of **“Authorized Agents”** previously established and click **“Submit”**.

A modal warning will appear as a security feature to confirm that you indeed want to appoint this particular law firm on the case. If so, click **“Submit”**.





The law firm has now been appointed to the case and will have access to manage the case in ADR Center. All tasks and actions pertaining to the case will now be shifted to the appointed law firm. Once the appointed law firm logs into their ADR Center account, this case will be available.

The screenshot displays a notification box at the top with a green checkmark and the text "Law Firm appointed successfully." The notification is highlighted with a red border. Below the notification, the interface shows case details including dates (11/01/2015), amounts (\$32,389.00), and hearing dates (11/01/2015 - 11/02/2015). At the bottom, there are buttons for "Document View" and "AR - 1", and a "Tasks (0)" link. A list of recent actions is visible at the bottom of the screen.

2. a. Scheduling Applicant Attorney: Matched
Team 8 (646) 663-4600 Respondent Attorney: Test Insurance Carrier Carrier F
ADRCenterTeam8@adr.org 12/23/20

nt: 11/01/2015 Arbitrator:
oute: \$32,389.00 Hearings:
e: 11/01/2015 - 11/02/2015
lo.
No.

Document View AR - 1 Tasks (0)

2016, Test Insurance Carrier (Jane Examiner) appointed a Law Firm as their representative for this case
6, Test Insurance Carrier (Jane Examiner) completed review of online message received on 11/20/2015 from AAA (Benny Tam
6, Test Insurance Carrier (Jane Examiner) uploaded a Supplemental Document



Withdraw a Case

Withdrawing a case is an **ACTION** that is only available to the Applicant/Applicant Attorney. Different procedures apply to withdrawing cases depending on the status of the case.

1. There are two types of withdrawals:

1. Without prejudice – the Applicant reserves the right to file the same case again in the future.
2. With prejudice – the Applicant will not re-file this case again.

2. Depending on the phase/stage of the case (i.e. Conciliation or Arbitration), the Arbitrator may need to review and/or approve the withdrawal as follows:

1. Case withdrawn during Conciliation phase – no approval required from anyone, regardless of the type of withdrawal.
2. Case withdrawn during Arbitration phase:
 - a. With prejudice – the Applicant does not need approval from the Arbitrator; case is closed.
 - b. Without prejudice – the Arbitrator will need to review the request.

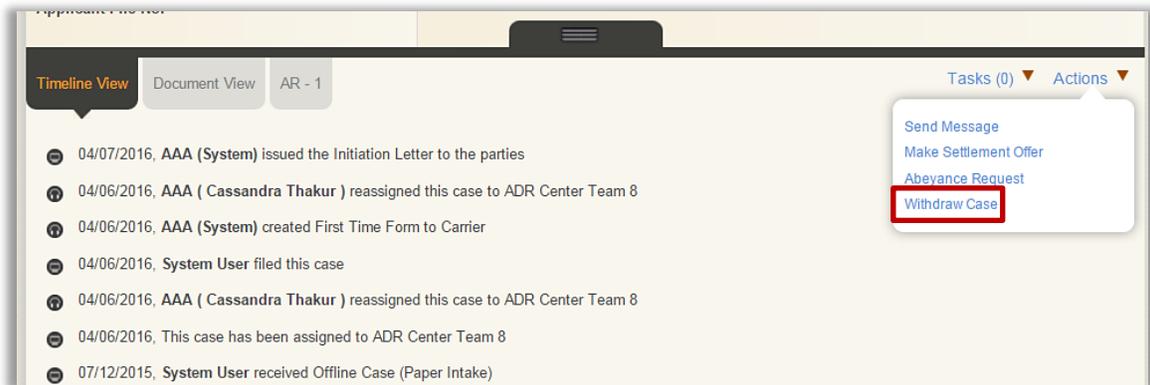
To withdraw a case, access the case record and go to the “**Actions**” menu.

The screenshot displays a case record for "Test Medical / test test vs. Test Insurance Carrier". The interface is organized into several sections:

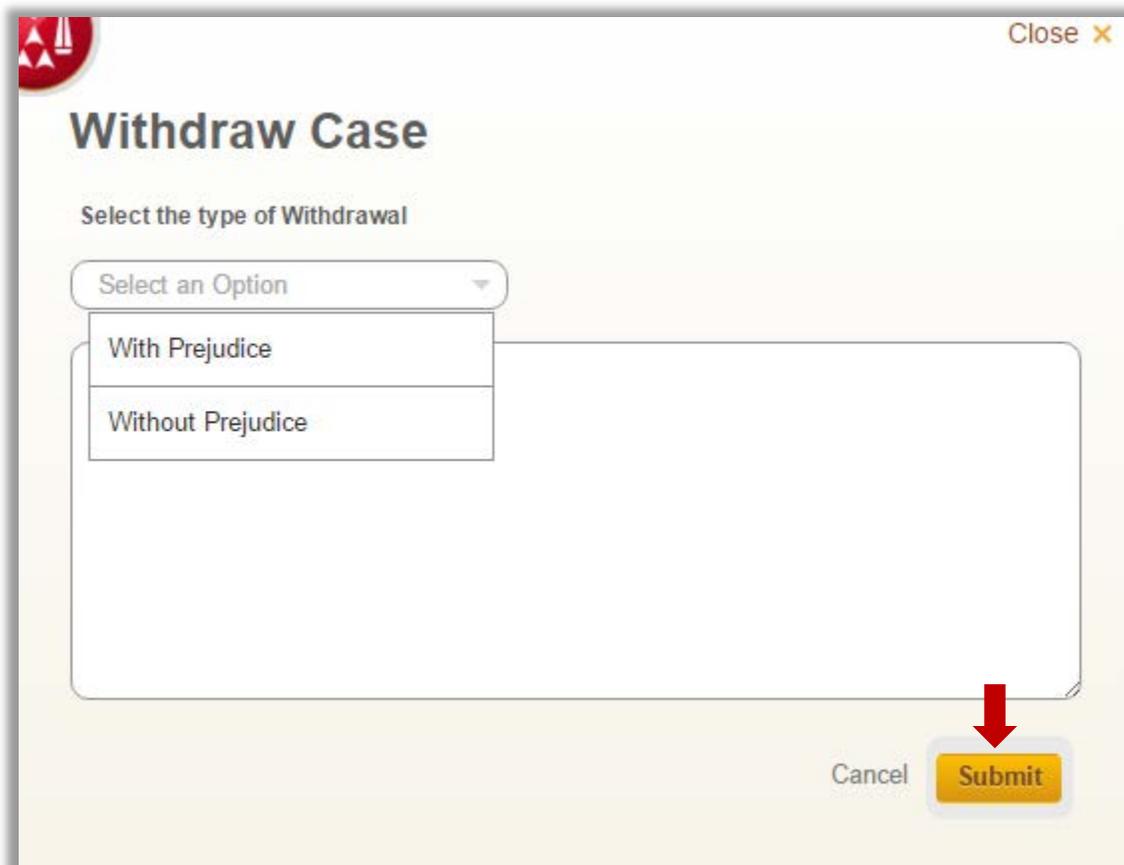
- Case Information:** Case: 17-15-1015-4221, Phase: 2 - Arbitration, Status: 2.b. Hearing scheduled, ADR Center Team 1, Phone: (646) 663-3461, Email: ADRCenterTeam1@adr.org.
- Parties:** Applicant: Test Medical, Injured Party: test test, Applicant Attorney: Law Offices of Test Attorney, Respondent: Test Insurance Carrier, Respondent Attorney: (blank).
- Related Cases:** Linked: 0, Matched: 0, Carrier Response Due: 12/23/2015.
- Case Details:** Date of Accident: 11/01/2015, Amount in Dispute: \$202.00, Dates of Service: 11/01/2015 - 11/02/2015, Insurer claim No., Applicant File No., Arbitrator:Carolynn Terrell-Nieves, Hearings: 12/23/2015 10:00 AM.
- Navigation:** Timeline View, Document View, AR - 1, Tasks (2), and Actions (highlighted in red).
- Activity Log:** 02/01/2016, AAA (System) sent Message notification to Law Offices of Test Attorney(Jim Attorney).



Then select **Withdraw Case**.



A modal window will appear. Indicate if the matter is being withdrawn **“With Prejudice”** or **“Without Prejudice”**. Enter your comments and click **“Submit”** when done.





The case has now been withdrawn, closed and the case record has been updated. The appropriate notices will be sent to the parties advising of the withdrawal.

17-15-1015-4 ✓ Case has been withdrawn successfully ✕

4 - Closed

4.d. Withdrawn with prejudice

Injured Party: test test

Applicant Attorney: Law Offices of Test Attorney

Respondent: Test Insurance Carrier

Respondent Attorney:

Related c

Linked:

Matched

Carrier P

12/23/20

11/01/2015

Arbitrator:Carolynn Terrell-Nieves

11/03/2015 10:00 AM

Timeline View Document View AR - 1

02/04/2016, Law Offices of Test Attorney (Jim Attorney) has withdrawn the case

Again, if the case was withdrawn “**Without Prejudice**” and the case is in the Arbitration phase, the matter will be forwarded to an Arbitrator for review.



Request Technical Correction of Award

“**Request Technical Correction of Award**” is an action that allows you to file a Technical Correction on an awarded case.

Access the case record, hover your mouse over the “**Actions**” menu and select “**Request Technical Correction of Award**”.



A modal will appear to capture your request for the Technical Correction. Enter any comments you may have. This section allows you to specify which page(s) of the award you are requesting a technical correction for.

A screenshot of a modal window titled "Request Technical Correction of Award". The modal has a close button in the top right corner. Below the title, there is a paragraph of text: "Please note that you have 30 calendar days from the mailing of the award to request a Technical Correction." Below this is another paragraph: "Please note that technical corrections do not apply to changes to the substance of the award. If you believe that there are errors in the substance of the award, please file an Appeal. Technical corrections include corrections of inconsistencies between the written text and form responses, incorrectly checked or unchecked boxes on award forms, arithmetic errors and typographical errors." Below the text, there is a section titled "Please enter the details of your Technical Correction Request below:". This section contains a dropdown menu for "1. Correction of the award on page" with the value "1" selected. Below this is another dropdown menu labeled "Select Correction Type". Below that is a text input field labeled "Details:". To the right of this field is a link that says "Add another technical correction". Below the "Details:" field is a larger text input field labeled "Enter Details". At the bottom right of the modal are two buttons: "Cancel" and "Submit".



Identify the page of the award where the correction needs to be made.

Then select the correction type.

Request Technical Correction of Award

Please note that you have 30 calendar days from the mailing of the award to request a Technical Correction.

Please note that technical corrections do not apply to changes to the substance of the award. If you believe that there are errors in the substance of the award, please file an Appeal. Technical corrections include corrections of inconsistencies between the written text and form responses, incorrectly checked or unchecked boxes on award forms, arithmetic errors and typographical errors.

Please enter the details of your Technical Correction Request below:

1. Correction of the award on page 1

Select Correction Type

- Select Correction Type
- Calculation Correction
- Date Correction
- Typographical Correction

Add another technical correction

Enter Details

Cancel Submit

Enter a description of the correction in the details text box. If there are other sections of the Award that you want to identify, click **“Add another technical correction”**.

Additional fields will appear allowing you to enter more information. Click **“Add another technical correction”** if more fields are needed.

Correction Request below:

...ect in the Summary section

Add another technical correction

Cancel Submit



When done, click “**Submit**”.

Please enter the details of your Technical Correction Request below:

1. Correction of the award on page

Details:

2. Correction of the award on page

Details:

[Add another technical correction](#)

Cancel

The Technical Correction filing has now been submitted and is logged in the Timeline View.

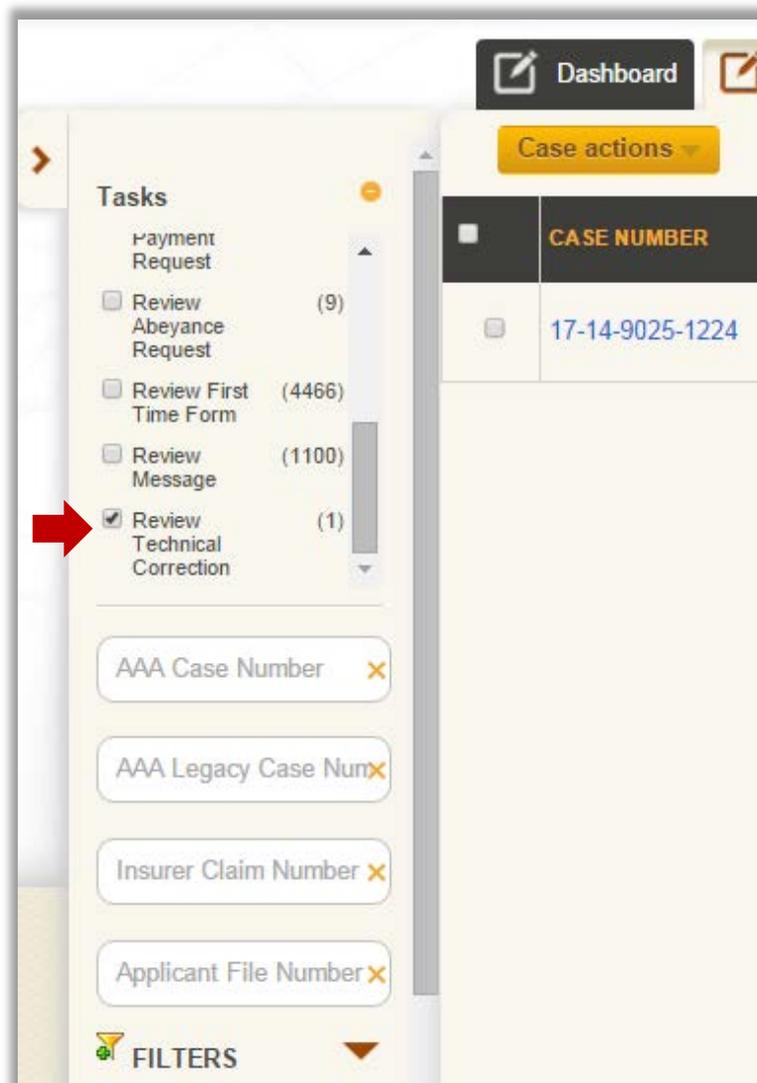
The appropriate notification will be sent to the other party advising of the Technical Correction filing and will also trigger a “**Review Technical Correction**” task for that party to provide them with an opportunity to respond.



Review Technical Correction

“**Review Technical Correction**” is a task that is triggered when a party files a Technical Correction on an awarded case. This task allows the opposing party the opportunity to respond to the Technical Correction already filed.

“**Review Technical Correction**” is a filterable task in the “**Tasks**” tab from your user homepage. After filtering, click the case you want to access.





Within the case record, hover you mouse over the “**Tasks**” menu and select the “**Review Technical Correction**” option.



A modal window will appear which will display the Technical Correction that was filed/submitted by the other party. Enter any comments you may have in the available text box and click “**Submit**” when complete.

A screenshot of a modal window titled "Review Technical Correction of Award". The window has a close button in the top right corner. Below the title, it says "APPLICANT has filed a Technical Correction of the award in this case". There is a section for "Technical Correction Information" with a list of corrections. Each entry includes "On Page:" and "Correction Type:". The corrections are: 1. On Page: 5, Correction Type: TYPOGRAPHICAL, Details: NYNF-4087. 2. On Page: 4, Correction Type: TYPOGRAPHICAL, Details: NYNF-4087. 3. On Page: 3, Correction Type: CALCULATION, Details: NYNF-4087. 4. On Page: 5, Correction Type: DATE, Details: NYNF-4087. 5. On Page: 1, Correction Type: CALCULATION, Details: NYNF-4087. Below this list is a section for "Comments supporting the request" with a text area containing "NYNF-4087" and another text area containing "The Applicant is correct.". At the bottom right, there are "Cancel" and "Submit" buttons. A red arrow points to the "Submit" button.



Once the response is submitted, it is captured and logged in the Timeline View and the appropriate notifications will be sent. The Technical Correction request and response will be transmitted to the AAA for review.

Big Bang Medical / Planet Earth vs. Charles Insurance

Case: 17-14-1000-0152	Injured Party: Planet Earth	Carrier: Charles Insurance	Related cases: Linked: 0 Due Date : <input type="text"/>
Phase: 2 - Arbitration	Applicant: Big Bang Medical	Carrier Rep:	
Status: 2.I. Technical correction	Applicant Attorney: Damon Attorney	Arbitrator: Frances Velazquez	
		Hearing:	

Timeline View | Document View | AR - 1 | Tasks (1) | Actions

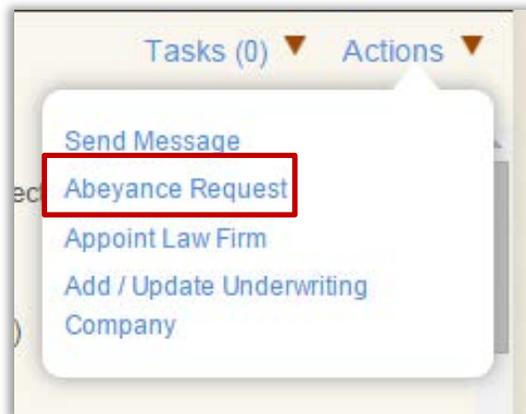
- 2014-07-07, Charles Insurance (Charles Meredith-Amoah) responded to the filed technical correction request
The Applicant is correct. The accident date is incorrect.
- 2014-07-03, Big Bang Medical (Damon Attorney) filed a technical correction of the award
- 2014-07-03, Frances Velazquez submitted award. It's downloadable in document view.
- 2014-07-03, Frances Velazquez submitted hearing disposition as hearing closed
- 2014-07-03, AAA (Matthew Connolly) scheduled the Hearing in this matter.



Abeyance by Agreement Request

If necessary you can request to place a case into abeyance by agreement. This task requires both parties to approve the request. Going into actions and selecting “**Abeyance Request**” will begin the process.

Please note this option is not designated for cases that should be placed in abeyance due to court orders. All cases that should be placed in abeyance due to court orders must be forwarded directly to the AAA.



A reason for the request is required. The reason can be entered into the text field. Once complete clicking “**Submit**” will generate a task for the opposing party to consent to the request.

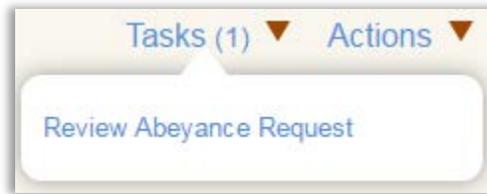
Abeyance Request

Please provide a reason for your Abeyance Request:

Cancel



The task “**Review Abeyance Request**” will generate for the opposing side.



The party can then choose to “**Accept**” or “**Reject**” the abeyance request. Entering a reason is not required. If the request is accepted the case will immediately be placed into abeyance.

If the request is rejected the status of the case will remain the same.

A screenshot of a dialog box titled "Review Abeyance". The text inside reads "Please respond to the request for Abeyance." Below this are two radio button options: "Accept" (which is selected) and "Reject". Below the radio buttons is a text input field with the placeholder text "Please enter comments if any." At the bottom right of the dialog box are two buttons: "Cancel" and "Submit". The "Submit" button is highlighted in yellow.



The Action “**Remove Case From Abeyance**” will be available when a case has already been placed in Abeyance by Agreement.



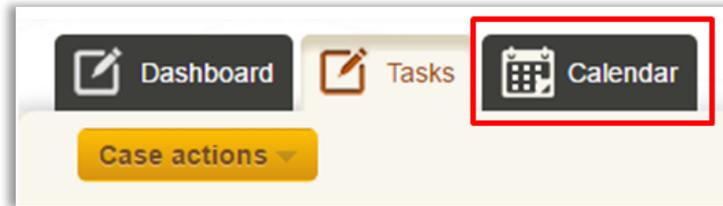
When you select “**Remove Case From Abeyance**” a modal box will appear with an option to enter comments if any. Then click “**Submit**”, the status will change back to an active status.





CALENDAR

The third tab on your homepage is the “**Calendar**” tab. This tab allows you to see upcoming hearings scheduled and awards issued.



Once in the “**Calendar**” tab there are several functions available to help gather specific information about upcoming hearings.

Training Law Firm

Select a Calendar Resource [View All](#) [View Calendar](#) From Date * To Date * [View Calendar Report](#)

Monthly view [Weekly view](#) [Daily view](#)

< March 2016 >	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Su Mo Tu We Th Fr Sa 28 29 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	27	28	29	30	31	April 1	2
April 2016 Su Mo Tu We Th Fr Sa 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30	3	4	5	6	7	8	9
May 2016 Su Mo Tu We Th Fr Sa 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 1 2 3 4 5 6 7 8 9 10 11	10	11	12 Hearings	13	14	15	16
	17	18	19	20	21	22	23
	24	25	26	27	28	29	30



Resources are the number of representatives a party has available to attend hearings. When hearings are scheduled, the amount of cases that can be scheduled for any given time is based on the available resources. Cases are always scheduled for resources in order of availability. The default view for the “Calendar Resource” is “View All”. When you select one of the resources only the cases assigned to that resource will be listed.

Select a Calendar Resource View All ▼ View Calendar

Resource-1

View All

The Calendar Report will generate an excel spreadsheet listing all cases within the date range entered. The report will only allow users to enter in a date range of 30 days (e.g. see screenshot).

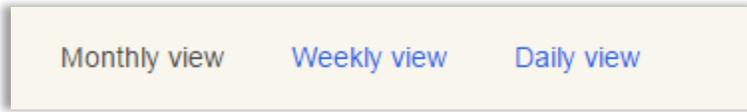
From Date * To Date * View Calendar Report

The report will list all pertinent information for the hearings including the date and time, hearing location and Arbitrator.

American Arbitration Association						
Training Law Firm					Calendar Report generated on - 03/25/2016	
Case #	Legacy Number	Hearing Date	Start Time	End Time	Arbitrator	Hearing Address
17-16-1016-9097	null	2016-04-12	09:00:00	09:15:00	Arbitrator Name	Hearing Address
17-16-1016-9098	null	2016-04-12	09:15:00	09:30:00	Arbitrator Name	Hearing Address
17-16-1016-9099	null	2016-04-12	09:30:00	09:45:00	Arbitrator Name	Hearing Address



The “**Calendar**” tab has three different views: Monthly view, Weekly view and Daily view.



The “**Monthly view**” is the default view when you enter the “**Calendar**” tab. In this view you can see all hearings scheduled for the month and awards issued on a specific day. You can change the month you are currently viewing by selecting the month on the side of the calendar. The arrows at the side of the month will allow you to scroll through the months.

< March 2016 >							Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Su	Mo	Tu	We	Th	Fr	Sa	28	29	March 1	2	3	4	5
		1	2	3	4	5			Hearings	Hearings			
6	7	8	9	10	11	12							
13	14	15	16	17	18	19							
20	21	22	23	24	25	26							
27	28	29	30	31			6	7	8	9	10	11	12
							Award issued	Hearings		Award issued			
April 2016													
Su	Mo	Tu	We	Th	Fr	Sa							
				1	2								
3	4	5	6	7	8	9							
10	11	12	13	14	15	16	13	14	15	16	17	18	19
17	18	19	20	21	22	23		Hearings				Award issued	Award issued
24	25	26	27	28	29	30							
May 2016													
Su	Mo	Tu	We	Th	Fr	Sa							
1	2	3	4	5	6	7							
8	9	10	11	12	13	14							
15	16	17	18	19	20	21							
22	23	24	25	26	27	28							
29	30	31	1	2	3	4	20	21	22	23	24	25	26
								Hearings	Hearings	Award issued		Hearings	Award issued
5	6	7	8	9	10	11	27	28	29	30	31	April 1	2
							Award issued		Hearings				



Move your mouse over a day with hearings; this will bring up a list of hearings scheduled and awards issued for that day. You can click on the link in that window to go directly into the case detail page.

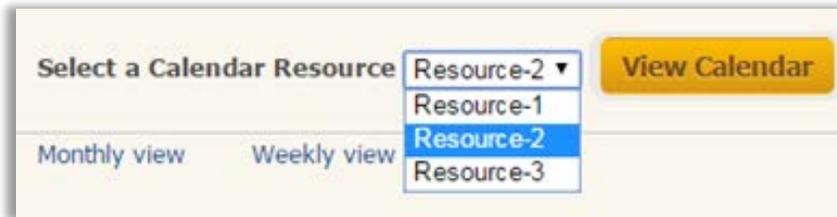
Hearings	Hearings	Awards issued
	1. 09:00 - 17-16-1016-9097	
	2. 09:15 - 17-16-1016-9098	
	3. 09:30 - 17-16-1016-9099	

The “**Weekly view**” allows you to view cases scheduled for the week selected. Unlike the “**Monthly view**”, you cannot see all resources available. The “**Weekly view**” will also show cases for the first resource until another resource is selected. Similar to the “**Monthly view**”, you can use the calendar on the left to select the date and change the month you are viewing.

< March 2016 >							4/10/2016	4/11/2016	4/12/2016	4/13/2016	4/14/2016	4/15/2016	4/16/2016
Su	Mo	Tu	We	Th	Fr	Sa							
28	29	1	2	3	4	5	8:00 AM						
6	7	8	9	10	11	12	8:15 AM						
13	14	15	16	17	18	19	8:30 AM						
20	21	22	23	24	25	26	8:45 AM						
27	28	29	30	31									
April 2016													
Su	Mo	Tu	We	Th	Fr	Sa	9:00 AM		17-16-1016-9097				
				1	2		9:15 AM <td></td> <th>17-16-1016-9098</th> <td></td> <td></td> <td></td> <td></td>		17-16-1016-9098				
3	4	5	6	7	8	9	9:30 AM <td></td> <th>17-16-1016-9099</th> <td></td> <td></td> <td></td> <td></td>		17-16-1016-9099				
10	11	12	13	14	15	16	9:45 AM <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>						
17	18	19	20	21	22	23	10:00 AM <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>						
24	25	26	27	28	29	30	10:15 AM <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>						
May 2016													
Su	Mo	Tu	We	Th	Fr	Sa	10:30 AM						
1	2	3	4	5	6	7	10:45 AM <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>						
8	9	10	11	12	13	14	11:00 AM <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>						
15	16	17	18	19	20	21							
22	23	24	25	26	27	28							
29	30	31	1	2	3	4							



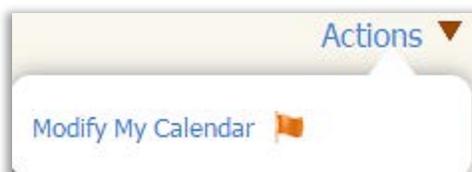
By selecting a different “**Calendar Resource**” and clicking “**View Calendar**” you will be able to see cases assigned to that Resource.



Cases will be listed by the case numbers; hovering your mouse over the case number will generate basic case information (caption). If you click on that case, it will bring you into the case detail page.

4/12/2016	4/13/2016	4/14/2016	4/15/2016
Case: 17-16-1016-9097 Test Medical/ That Person Vs Test Insurance Company			
17-16-1016-9097			
17-16-1016-9098			
17-16-1016-9099			

The action “**Modify My Calendar**” can be found in “**Weekly view**”; this will allow you to make a request to block your calendar for specific days and times when the firm may not be available for scheduling. (Note: This is not an alternative to request an adjournment. All adjournment requests should still be processed through the Team assigned to your case.)





When making a request you will enter the required information including the date and times you wish to block as well as the reason. Once completed an email will be sent to the scheduling Supervisor with the request (Note: When entering a request please include your name and contact information so that the Supervisor will know who to contact, if needed.)

Modify Calendar Request

Block my calendar

From: * at * -Select time- ▼

To: * at * -Select time- ▼

Enter reason for request: *

* Required fields

Submit

The “**Weekly view**” option will allow you to see more details for the cases scheduled on a specific day. You can use the calendar to the left to select the day you wish to view.

4/12/2016

Month	Su	Mo	Tu	We	Th	Fr	Sa
March 2016	28	29	1	2	3	4	5
	6	7	8	9	10	11	12
	13	14	15	16	17	18	19
	20	21	22	23	24	25	26
	27	28	29	30	31		
April 2016						1	2
	3	4	5	6	7	8	9
	10	11	12	13	14	15	16
	17	18	19	20	21	22	23
	24	25	26	27	28	29	30
May 2016							
	1	2	3	4	5	6	7
	8	9	10	11	12	13	14
	15	16	17	18	19	20	21
	22	23	24	25	26	27	28
	29	30	31	1	2	3	4

9:00 AM	Case: 17-16-1016-9097 Test Medical/ That Person Vs Test Insurance Company Applicant Lawfirm: Levar's Legal Super Friends Address: Aladar Gyimesi 1115 Broadway, 11th Floor , New York NY 10010
9:15 AM	Case: 17-16-1016-9098 Test Medical/ Some Person Vs Test Insurance Company Applicant Lawfirm: Levar's Legal Super Friends Address: Aladar Gyimesi 1115 Broadway, 11th Floor , New York NY 10010
9:30 AM	Case: 17-16-1016-9099 Test Medical/ Test Person 3rd Vs Test Insurance Company Applicant Lawfirm: Levar's Legal Super Friends Address: Aladar Gyimesi 1115 Broadway, 11th Floor , New York NY 10010

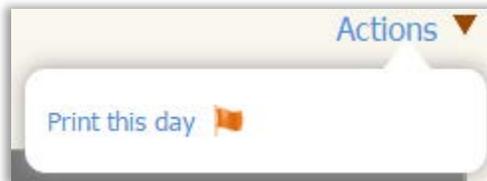


You will see the case information as well as the Arbitrator’s location. Clicking on the case number will bring you directly into the case detail. Clicking on the address will link you to the location on Google Maps.

9:00 AM	Case: 17-16-1016-9097 Test Medical/ That Person Vs Test Insurance Company Applicant Lawfirm: Levar’s Legal Super Friends Address: Aladar Gyimesi 1115 Broadway, 11th Floor , New York NY 10010
9:15 AM	Case: 17-16-1016-9098 Test Medical/ Some Person Vs Test Insurance Company Applicant Lawfirm: Levar’s Legal Super Friends Address: Aladar Gyimesi 1115 Broadway, 11th Floor , New York NY 10010
9:30 AM	Case: 17-16-1016-9099 Test Medical/ Test Person 3rd Vs Test Insurance Company Applicant Lawfirm: Levar’s Legal Super Friends Address: Aladar Gyimesi 1115 Broadway, 11th Floor , New York NY 10010

You can print this list of cases by going to Actions and selecting “Print this day”.

NOTE: If an account/party has multiple resources, “Print this day” will have to be done for each Resource.



This will generate a list of cases for the day currently selected.

Hearing Schedule - April 12, 2016	
09:00 AM - 09:15 AM	Case: 17-16-1016-9097 Test Medical/ That Person Vs Test Insurance Company Applicant Lawfirm: Levar’s Legal Super Friends Address: Aladar Gyimesi 1115 Broadway, 11th Floor , New York NY 10010
09:15 AM - 09:30 AM	Case: 17-16-1016-9098 Test Medical/ Some Person Vs Test Insurance Company Applicant Lawfirm: Levar’s Legal Super Friends Address: Aladar Gyimesi 1115 Broadway, 11th Floor , New York NY 10010
09:30 AM - 09:45 AM	Case: 17-16-1016-9099 Test Medical/ Test Person 3rd Vs Test Insurance Company Applicant Lawfirm: Levar’s Legal Super Friends Address: Aladar Gyimesi 1115 Broadway, 11th Floor , New York NY 10010



DASHBOARD

When logged into ADR Center, from the user’s homepage, you may access the “**Dashboard**” section. In the “**Dashboard**” tab, users will have access to a list of categories to select (see below for a breakdown of the DASHBOARD CATERGORIES). These categories serve as “pre-filters” to ADR Center’s cases grid in the user homepage. Select a category by clicking on the hyperlink of that particular category. The numbers in parenthesis represent how many cases there are for that category.

AMERICAN ARBITRATION ASSOCIATION®
 Powered by MODRIA Resolution Center
 New York No-Fault Insurance
 Home Award Search Help Jane Logout

Dashboard Tasks Calendar AAA Case Number Q

Waiting for first time hearing	(1)	Hearings in next 7 days	(0)	Filed in last 7 days	(0)
Awarded in last 30 days	(0)	Master Appeal awarded in last 30 days	(0)	Carrier responses due in next 10 days	(0)
Carrier responses past due	(2)	Master Appeal filed in last 30 days	(0)	Conciliated in last 7 days	(0)
Pending Settlement Offers	(1)				

Once the “**Dashboard**” category is selected, ADR Center will filter the cases grid based on the criteria for that category. The category selected by the user will be indicated at the top of the cases grid. Additionally, the columns of the cases grid will update to show relevant information based on the category selected.

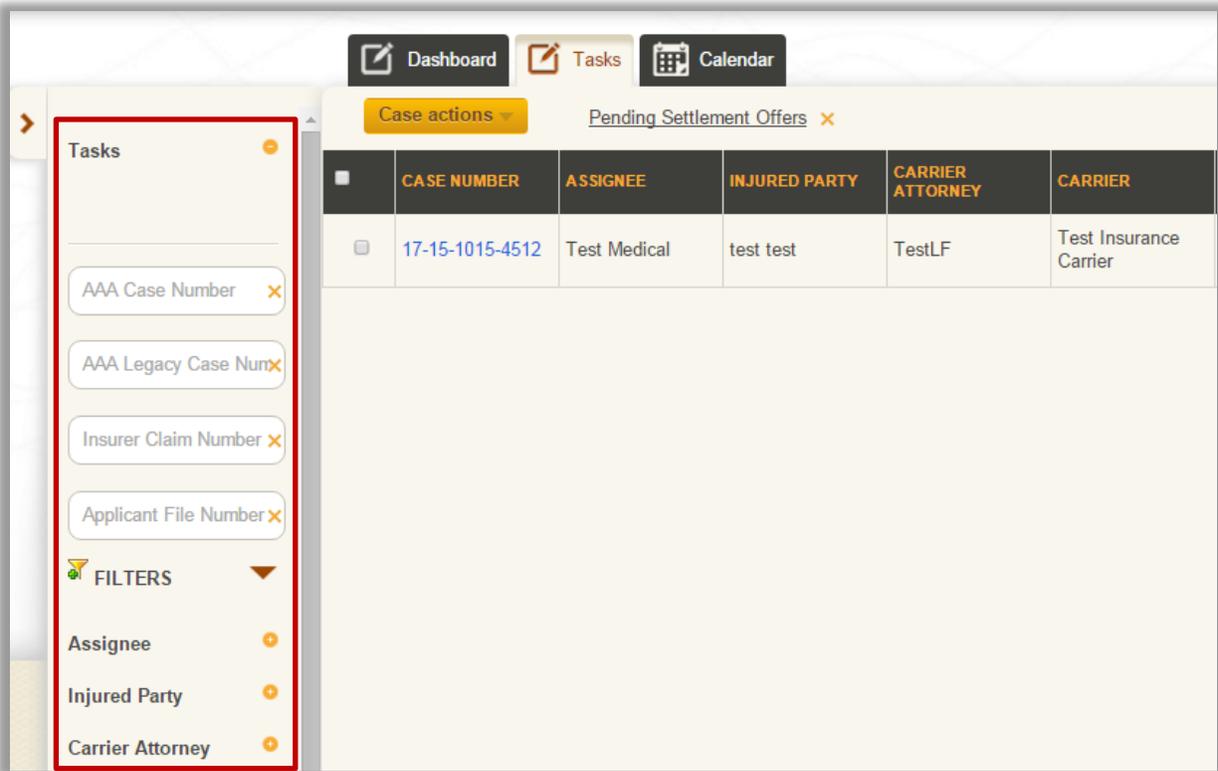
Dashboard Tasks Calendar AAA Case Number Q

Case actions Pending Settlement Offers x Export Table Data

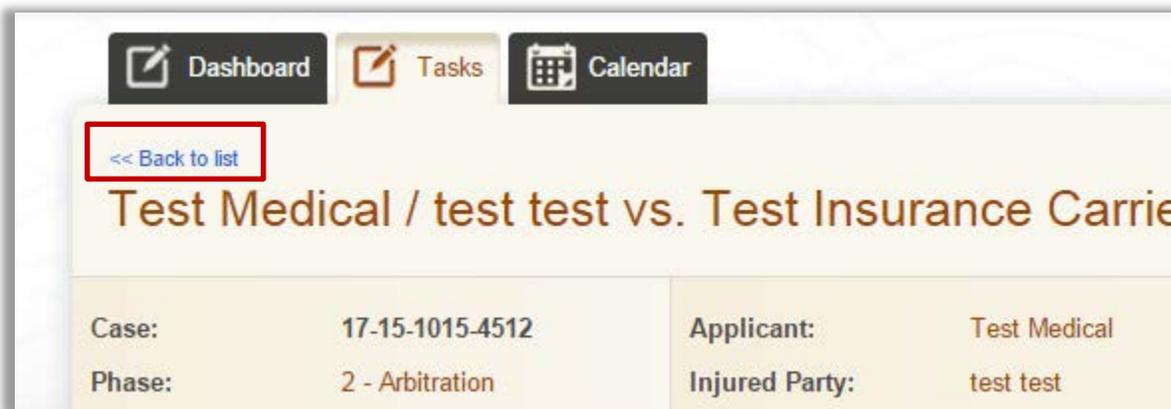
	CASE NUMBER	ASSIGNEE	INJURED PARTY	CARRIER ATTORNEY	CARRIER	STATUS	AMOUNT IN DISPUTE	FILING DATE	APPL NO
<input type="checkbox"/>	17-15-1015-4512	Test Medical	test test	TestLF	Test Insurance Carrier	2.a. Scheduling	\$ 32,389.00	11/23/2015	



Users will still have the ability to apply additional filters in combination with the Dashboard category selected, from the filters tab.



When accessing a case record through the Dashboard, clicking “**Back to list**” or back on your web browser (i.e. Internet Explorer, Google Chrome, etc.) will take the user back to the cases grid. However, the cases grid will retain the Dashboard category that was selected.





To reset the Dashboard category and revert to the default view of the cases grid, where no filters are applied, simply click “X” next to the category name.

The screenshot shows the American Arbitration Association dashboard for 'New York No-Fault Insurance'. The header includes the logo, the text 'AMERICAN ARBITRATION ASSOCIATION®', 'Powered by MODRIA Resolution Center', and navigation links: Home, Award Search, Help, Jane, Logout. Below the header are tabs for Dashboard, Tasks, and Calendar. A search bar for 'AAA Case Number' is on the right. A filter bar shows 'Case actions' and 'Pending Settlement Offers' with a red arrow pointing to an 'X' icon. An 'Export Table Data' button is on the right. Below the filter bar is a table with the following data:

	CASE NUMBER	ASSIGNEE	INJURED PARTY	CARRIER ATTORNEY	CARRIER	STATUS	AMOUNT IN DISPUTE	FILING DATE
	17-15-1015-4512	Test Medical	test test	TestLF	Test Insurance Carrier	2. a. Scheduling	\$ 32,389.00	11/23/2015



Dashboard Categories

CATEGORY NAME	RESULTS WHEN SELECTED
Waiting for first time hearing	All active cases that have been escalated to arbitration that have never had a hearing scheduled to date; the results are sorted by escalation date from oldest to most recent.
Hearings in next 7 days	All cases in which the hearing date is 7 days or less from the current date; the results are sorted by closest hearing DATE, ARBITRATOR NAME, then earliest hearing TIME.
Filed in last 7 days	All cases filed (or reset) within the last 7 days; the results are sorted by most recent file date to oldest.
Awarded in last 30 days	All cases in which an award of any type has been issued within the past 30 days; the results are sorted by most recently awarded to the oldest award.
Master Appeal awarded in last 30 days	Master Appeals that have been Awarded in last 30 days.
Carrier responses due in next 10 days	All cases in the Conciliation phase where Carrier Response Due Date is due in 10 days (or less) from the current date AND there is no “DEFENSE/ORIGINAL DOCUMENT ORDER RESPONDENT” document in the file; sorted by closest due date to furthest due date.
Carrier responses past due	All cases in Conciliation where the Carrier Response Due Date has passed AND there is no DEFENSE/ORIGINAL DOCUMENT ORDER RESPONDENT in file; the results are sorted by earliest due date to latest due date.
Master Appeal filed in last 30 days	All appeals initiated in the last 30 days, newest to oldest.
Conciliated in last 7 days	Lists all cases closed as settled within the past 7 days. It includes accepted settlement offers and cases where AAA captured the settlement agreement into the system.
Pending Settlement Offers	Lists cases that the party has extended a settlement offer on that the opposing party has not responded to yet. The cases will be sorted from the oldest offers to the newest offers.



AWARD SEARCH

The “**Award Search**” feature allows users to search for redacted arbitration awards. The “**Award Search**” cannot be used to search for Consent Awards, only arbitration awards.



The “**Award Search**” contains several fields that can be used to either look up a specific case or a variety of cases based on the information entered. These fields can help you condense the results of your search.

You can enter the Old Case Number (e.g. 412001000000) or the New Case Number (e.g.41-16-0000-0000).

Redacted Award Search

Old Case Number:

New Case Number:

CaseNo format:99-99-9999-9999



Here you can input different dates such as the filing date.

Case Filed between:	<input type="text"/>		and	<input type="text"/>	
Case Escalated to Arbitration between:	<input type="text"/>		and	<input type="text"/>	
Case Appealed between:	<input type="text"/>		and	<input type="text"/>	
Award Submitted between:	<input type="text"/>		and	<input type="text"/>	
Master Appeal Award Submitted between:	<input type="text"/>		and	<input type="text"/>	

If you are looking for specific issues you can use the “**Case Issue**” field to filter your search. This field is based on information entered by the AAA staff during the Conciliation process.

Case Issue:	<input type="checkbox"/> Select / unselect all
	<input type="checkbox"/> \$100 penalty owed by applicant
	<input type="checkbox"/> 180 day rule
	<input type="checkbox"/> 30-day notice d/o/a after April 5, 2002
	<input type="checkbox"/> 45 day rule
	<input type="checkbox"/> 90-day notice d/o/a before April 5, 2002
	<input type="checkbox"/> Acupuncture
	<input type="checkbox"/> Anesthesia
	<input type="checkbox"/> Applicant late submission
	<input type="checkbox"/> Attorney / filing fee in dispute; Interest only disputed
	<input type="checkbox"/> Bill denied 120 calender days after verification request



If you are searching for a specific Arbitrator you can use the below field to do so:

Name of Arbitrator:	<ul style="list-style-type: none"><input type="checkbox"/> Select / unselect all<input type="checkbox"/> Achtziger , Michael<input type="checkbox"/> Adelson , Sandra<input type="checkbox"/> Adler , Joshua<input type="checkbox"/> Andreotta , Joanne<input type="checkbox"/> Avalone , Nancy Kramer
---------------------	--



You can search for Redacted Master Arbitrator decisions. This field allows you to search for a specific Arbitrator or for all Master Arbitrators.

Name of Master Arbitrator	<input type="checkbox"/> Select / unselect all <input type="checkbox"/> Ancowitz, Esq. , Richard <input type="checkbox"/> DeCarlo, Esq. , Donald <input type="checkbox"/> D'Ammora, Esq. , Vic <input type="checkbox"/> Esposito, Esq. , Vincent <input type="checkbox"/> Felenstein, Esq. , Marilyn <input type="checkbox"/> Godson, Esq. , Frank <input type="checkbox"/> Hershendorfer, Esq. , Victor J. <input type="checkbox"/> Levy, Esq. , Harris <input type="checkbox"/> Merani, Esq. , Peter J. <input type="checkbox"/> Powers, Esq. , Anne L.
---------------------------	--

If you are searching for a specific word or phrase you may utilize the text search to find Awards that list that word or phrase. You can also add words you would like to omit in the **“Without The Words”** field.

Full Text Search:	<input type="text"/>
Using:	<input checked="" type="radio"/> All Words <input type="radio"/> Any Word <input type="radio"/> Exact Phrase
Without The Words:	<input type="text"/>



GENERAL INFORMATION

The ADR No Fault Help Page on our website, <http://go.adr.org/nofaulthelp>, offers a wealth of information. It is designed to make navigating the No-Fault platform user friendly.

For specific case information, you may contact the handling team assigned to the case. This information can be found on the initiation letter or in the case detail screen.

If you need assistance registering to gain access to ADR Center, you may either contact the Technical Support Team at # 646 663-3488 or the Customer Support Team at #917-438-1660.

You may also contact the Support Team via email - nysinsurance@adr.org for technical support on ADR Center. If you need ADR Center training, please submit an email request to nysinsurance@adr.org.



CASE STATUS GLOSSARY

CASE PHASE	STATUS	DEFINITION
0 - Filing	0.a. Pre-AR-1	Case filed outside of system (i.e. mail or email) pending processing by Intake
	0.b. AR-1 in progress	Online filing that is not yet completed and submitted
	0.c. Payment pending	Case pending filing fee payment
1 - Conciliation	1.a. Case Initiated	New case filing
	1.c. Past 15-day mark	Past 15 day mark of defense due date
	1.d. Past 30-day mark	Past 30 day mark of defense due date
	1.e. Past 60-day mark	Past 60 day mark of defense due date
	1.f. Past 90-day mark	Past 60 day mark of defense due date
	1.g. In Abeyance (Parties' agreement)	Parties agree to put case on hold
	1.h. In Abeyance (Court order)	Court Order to put case on hold
	1.i. In Abeyance (renewal coming)	Abeyance renewal fee due
	2 - Arbitration	2.a. Scheduling
2.b. Hearing scheduled		A hearing date has been scheduled
2.c. Recusal		A recusal request has been submitted and is currently under
2.d. Post hearing brief requested		Arbitrator has requested Post Hearing Briefs from parties
2.e. IHC requested		Arbitrator has requested IHC Report
2.h. Hearing continued		The Arbitrator has continued the hearing for a new date
2.i. Hearing closed		Hearing has been closed by the Arbitrator; the Award is pending
2.j. Award submitted to AAA		Award has been rendered by the Arbitrator
2.k - Consent award submitted to AAA		Consent Award has been rendered by the Arbitrator
2.l. Technical correction		A Technical Correction of the Award has been requested
2.m. In Abeyance (Parties' agreement)		Parties agree to put case on hold
2.n. In Abeyance (Court order)		Court Order to put case on hold
2.o. In Abeyance (renewal coming up)		Case in abeyance over 1 year. Abeyance fee due
2.p - Technical correction		Technical Correction Award has been rendered by the Arbitrator
2.q - Remanded award submitted to AAA		Remanded Award has been rendered by the Arbitrator
2.r - Remanded consent award submitted to AAA	Remanded Consent Award has been rendered by the Arbitrator	
3 - Master Arbitration	3.a. Filing in progress	Master Arbitration filed; appeal request be processed
	3.b. Payment pending	Master Arbitration filing fee pending
	3.c. Appellant submission pending	A master Arbitrator has been appointed to the case
	3.d. Respondent submission	Respondent submission due
	3.e. Award pending	Master Arbitration Award due
	3.f. Award submitted to AAA	Master Arbitration award processed
	3.i. In Abeyance (Parties'	Parties agree to put case on hold
	3.j. In Abeyance (Court order)	A court Order was received to put the case on hold
3.k. In Abeyance (renewal coming)	Case in abeyance over 1 year; abeyance fee due	



CASE PHASE	STATUS	DEFINITION
4 - Closed	4.a. Duplicate	Case was a duplicate filing
	4.b. Case settled	Case settled between parties
	4.c. Administratively closed	Case administratively closed
	4.d. Withdrawn with prejudice	Case withdrawn with prejudice by Applicant
	4.e. Withdrawn without prejudice	Case withdrawn without prejudice by Applicant
	4.f. Awarded	Case is awarded and closed.
	4.g. Awarded Master	Master Award rendered on case.
	4.h - Consent awarded	Case is awarded and closed.