



AMERICAN ARBITRATION ASSOCIATION®

APPOINT AND REMOVE A LAW FIRM



ADD A NEW AUTHORIZED AGENT

Prior to being able to appoint a law firm to 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 MY ACCOUNT user guide for instructions on how to add AUTHORIZED AGENTS.

The screenshot displays the 'AUTHORIZED USERS_2' section of the ADR Center interface. It features a table with columns for 'LAST NAME', 'FIRST NAME', 'EMAIL', and 'ADMIN'. Two users are listed: Jane Adjuster (jane@beninsurance.com) and Benjamin Carpenter (carpenterb1@adr.org), both with 'ADMIN' checkboxes checked. A '+ Add a new user' link is visible below the table.

Below this is the 'CHILD COMPANIES' section, which includes a table with columns for 'COMPANY NAME', 'ADMIN EMAIL', and 'BILLABLE?'. A toolbar with 'Delete Child Company' and 'Add Child Company' options is located below the table.

The 'AUTHORIZED AGENTS' section is at the bottom, featuring a table with columns for 'FULL LEGAL NAME', 'EMAIL', 'AGENT TYPE', and 'REMOVE'. Two agents are listed: Ms. Melendez Law Firm (melendez1@adr.org) and House Lannister PC (jannister@houselannister.net), both with 'AGENT TYPE' set to 'LAW FIRM'. A '+ Add a new agent' link is highlighted with a red box at the bottom right of the table.

APPOINT A LAW FIRM

Within the case record, hover your mouse over the **ACTIONS** menu and select **APPOINT LAW FIRM**.

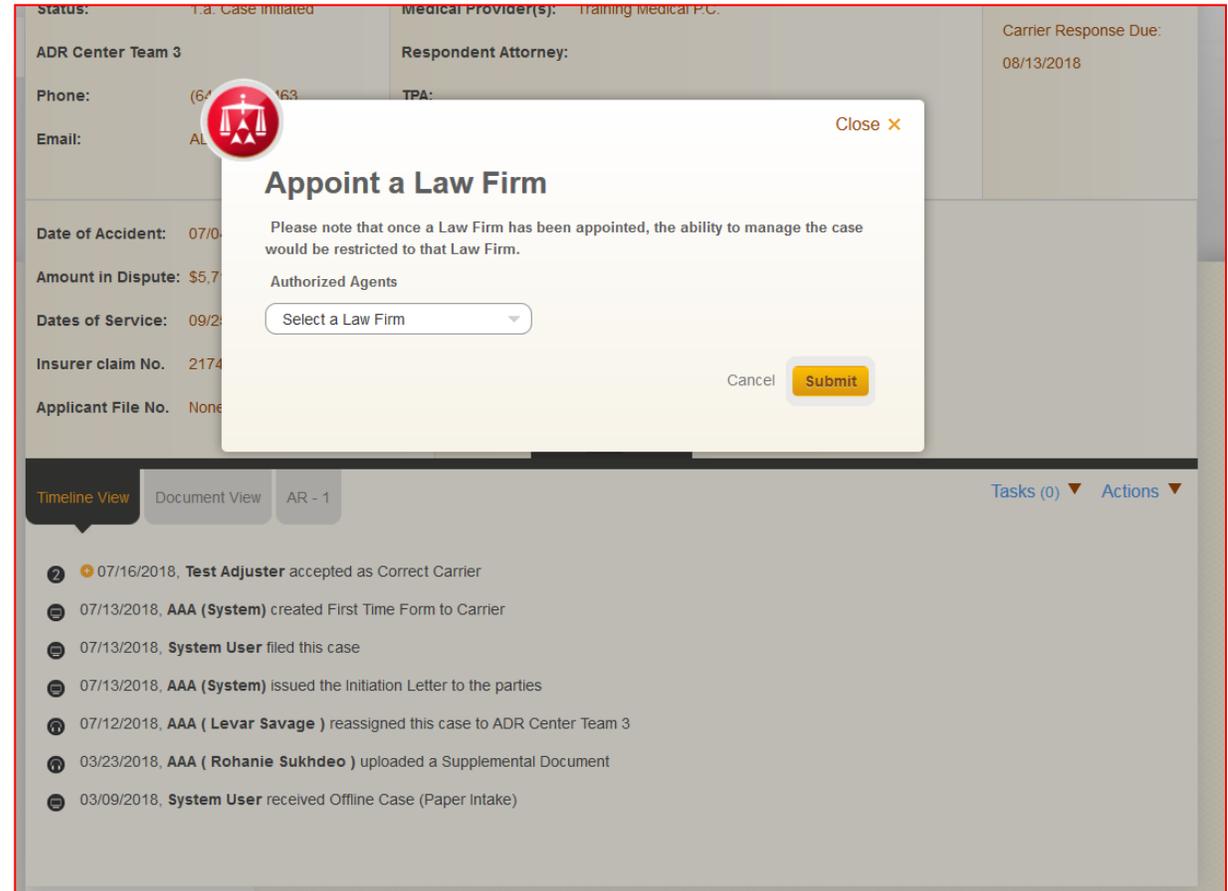
The screenshot displays a case record for "Training Medical P.C. / Bill Marroy vs. Testing Insurance Company". The interface is divided into several sections:

- Case Information:** Case: 41-18-1088-7852, Phase: 1 - Conciliation, Status: 1.a. Case initiated, ADR Center Team 3, Phone: (646) 663-3463, Email: ADRCenterTeam3@adr.org.
- Attorney and Party Information:** Applicant Attorney: Test & Test Law Firm (CA), Injured Party(ies): Bill Marroy, Medical Provider(s): Training Medical P.C., Respondent Attorney: [blank], TPA: [blank], Carrier: Testing Insurance Company.
- Related cases:** Linked: 0, Matched: 0, Carrier Response Due: 08/13/2018.
- Accident and Service Details:** Date of Accident: 07/04/2012, Amount in Dispute: \$5,712.00, Dates of Service: 09/25/2016 - 09/25/2016, Insurer claim No.: 2174169877, Applicant File No.: None.
- Arbitrator and Hearings:** [blank]
- Timeline View:** Document View, AR - 1. The timeline shows events from 03/09/2018 to 07/16/2018, including carrier acceptance, form creation, case filing, initiation letters, case reassignment, document uploads, and offline case receipt.
- Actions Menu:** Tasks (0) and Actions (dropdown). The Actions menu is open, showing options: Abeyance Request, Add / Update Underwriting Company, Send Message, Make Settlement Offer, Appoint Law Firm (highlighted), and Request Time Extension.

APPOINT A LAW FIRM

A pop-up window will appear to select a law firm.

Please Note: That once a law Firm has been appointed, the ability to manage the case would be restricted to that Law Firm.



The screenshot displays a case management interface with a pop-up window titled "Appoint a Law Firm". The pop-up window contains the following text:

Appoint a Law Firm Close X

Please note that once a Law Firm has been appointed, the ability to manage the case would be restricted to that Law Firm.

Authorized Agents

Select a Law Firm

Cancel

The background interface shows case details:

- Status: T.a. Case Initiated
- Medical Provider(s): Training Medical P.C.
- Carrier Response Due: 08/13/2018
- ADR Center Team 3
- Respondent Attorney:
- Phone: (64) 163
- TPA:
- Email: AL
- Date of Accident: 07/0
- Amount in Dispute: \$5.7
- Dates of Service: 09/2
- Insurer claim No. 2174
- Applicant File No. None

At the bottom, there is a "Timeline View" tab selected, showing a list of events:

- 07/16/2018, Test Adjuster accepted as Correct Carrier
- 07/13/2018, AAA (System) created First Time Form to Carrier
- 07/13/2018, System User filed this case
- 07/13/2018, AAA (System) issued the Initiation Letter to the parties
- 07/12/2018, AAA (Levar Savage) reassigned this case to ADR Center Team 3
- 03/23/2018, AAA (Rohanie Sukhdeo) uploaded a Supplemental Document
- 03/09/2018, System User received Offline Case (Paper Intake)

APPOINT A LAW FIRM

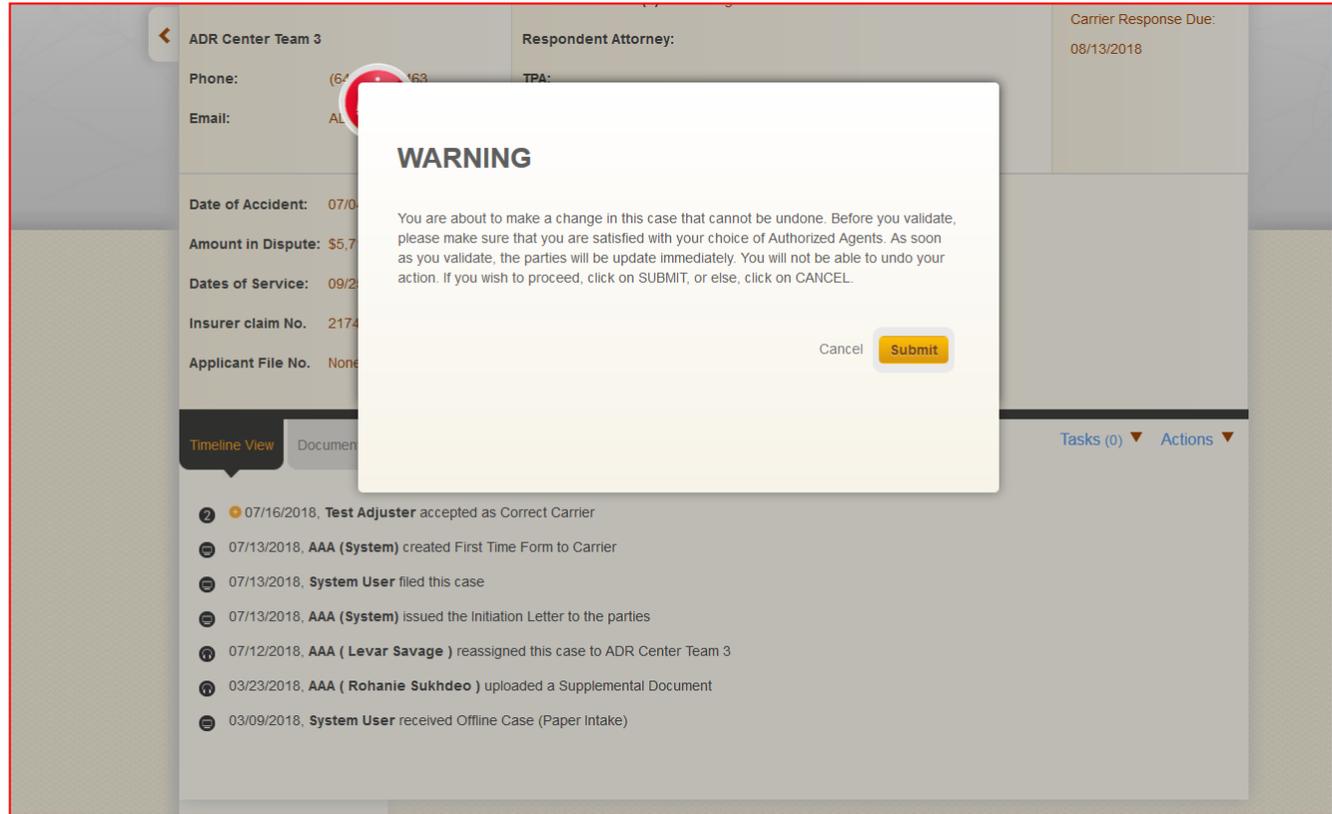
Select a law firm from the list of Authorized Agents previously established and click **SUBMIT**.

The screenshot displays a web application interface for a case management system. The background shows a case summary with fields for Status (1.a. Case Initiated), Medical Provider(s) (Training Medical P.C.), Respondent Attorney, Carrier Response Due (08/13/2018), Date of Accident (07/0...), Amount in Dispute (\$5.7...), Dates of Service (09/2...), Insurer claim No. (2174...), and Applicant File No. (None). A modal window titled "Appoint a Law Firm" is overlaid on the page. The modal contains a warning: "Please note that once a Law Firm has been appointed, the ability to manage the case would be restricted to that Law Firm." Below the warning is a section labeled "Authorized Agents" with a dropdown menu currently showing "Test Case Law Firm (RA)". The modal also includes "Cancel" and "Submit" buttons. At the bottom of the page, there is a "Timeline View" tab selected, showing a list of events: "07/16/2018, Test Adjuster accepted as Correct Carrier", "07/13/2018, AAA (System) created First Time Form to Carrier", "07/13/2018, System User filed this case", "07/13/2018, AAA (System) issued the Initiation Letter to the parties", "07/12/2018, AAA (Levar Savage) reassigned this case to ADR Center Team 3", "03/23/2018, AAA (Rohanie Sukhdeo) uploaded a Supplemental Document", and "03/09/2018, System User received Offline Case (Paper Intake)".



APPOINT A LAW FIRM

A pop-up warning will appear as a security feature to confirm that you want to appoint this particular law firm on the case. If so, click **SUBMIT**.



APPOINT A LAW FIRM

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

The screenshot displays a web interface for an ADR Center. At the top, a dark notification banner with a green checkmark icon states: "Law Firm appointed successfully. Attorney: [redacted]". To the right of this banner, a yellow box indicates "Carrier Response Due: 08/13/2018". Below the notification, a form displays case details:

- Center Team 3** (with phone number (646) 663-3463 and email ADRCenterTeam3@adr.org)
- TPA:** [redacted]
- Carrier:** Testing Insurance Company
- Date of Accident:** 07/04/2012
- Amount in Dispute:** \$5,712.00
- Period of Service:** 09/25/2016 - 09/25/2016
- Carrier claim No.:** 2174169877
- Accident File No.:** None

Below the form, a navigation bar includes "Line View", "Document View", and "AR - 1". On the right, there are "Tasks (0)" and "Actions" dropdown menus. The main content area shows a chronological list of events:

- 07/16/2018, **Testing Insurance Company (Test Adjuster)** appointed **Test Case Law Firm (RA)** as their representative for this case
- 07/16/2018, **Test Adjuster** accepted as Correct Carrier
- 07/13/2018, **AAA (System)** created First Time Form to Carrier
- 07/13/2018, **System User** filed this case
- 07/13/2018, **AAA (System)** issued the Initiation Letter to the parties
- 07/12/2018, **AAA (Levar Savage)** reassigned this case to ADR Center Team 3
- 03/23/2018, **AAA (Rohanie Sukhdeo)** uploaded a Supplemental Document
- 03/09/2018, **System User** received Offline Case (Paper Intake)

APPOINT A LAW FIRM

Once the webpage is refreshed you will find that the Law Firm has been appointed in the case caption. Also, you will see that the Law Firm has been appointed in the Timeline View.

The screenshot displays a case management interface for the case "Training Medical P.C. / Bill Marroy vs. Testing Insurance Company". The interface is divided into several sections:

- Case Information:** Case: 41-18-1088-7852, Phase: 1 - Conciliation, Status: 1.a. Case Initiated.
- ADR Center Team 3:** Phone: (646) 663-3463, Email: ADRCenterTeam3@adr.org.
- Applicant Attorney:** Test & Test Law Firm (CA).
- Injured Party(ies):** Bill Marroy.
- Medical Provider(s):** Training Medical P.C.
- Respondent Attorney:** Test Case Law Firm (RA).
- TPA:**
- Carrier:** Testing Insurance Company.
- Related cases:** Linked: 0, Matched: 0, Carrier Response Due: 08/13/2018.
- Date of Accident:** 07/04/2012.
- Amount in Dispute:** \$5,712.00.
- Dates of Service:** 09/25/2016 - 09/25/2016.
- Insurer claim No.:** 2174169877.
- Applicant File No.:** None.
- Arbitrator:**
- Hearings:**

At the bottom, there is a navigation bar with "Timeline View" (selected), "Document View", and "AR - 1". To the right, it shows "Tasks (0)" and "Actions".

The timeline view shows the following events:

- 07/16/2018, Testing Insurance Company (Test Adjuster) appointed Test Case Law Firm (RA) as their representative for this case
- 07/16/2018, Test Adjuster accepted as Correct Carrier
- 07/13/2018, AAA (System) created First Time Form to Carrier
- 07/13/2018, System User filed this case
- 07/13/2018, AAA (System) issued the Initiation Letter to the parties
- 07/12/2018, AAA (Levar Savage) reassigned this case to ADR Center Team 3
- 03/23/2018, AAA (Rohanie Sukhdeo) uploaded a Supplemental Document

REMOVE A LAW FIRM

Within the case record, hover your mouse over the ACTIONS menu and select **REMOVE LAW FIRM**.

The screenshot displays a case record interface with the following details:

- DR Center Team 3** (Phone: (646) 663-3463, Email: ADRCenterTeam3@adr.org)
- Respondent Attorney:** Test Case Law Firm (RA)
- Carrier:** Testing Insurance Company
- Carrier Response Due:** 08/13/2018
- Date of Accident:** 07/04/2012
- Amount in Dispute:** \$5,712.00
- Arbitrator:**
- Hearings:**
- Dates of Service:** 09/25/2016 - 09/25/2016
- Insurer claim No.:** 2174169877
- Applicant File No.:** None

The interface includes tabs for **Timeline View**, **Document View**, and **AR - 1**. A dropdown menu for **Actions** is open, showing the following options:

- Add / Update Underwriting Company
- Make Settlement Offer
- Remove Law Firm** (highlighted)
- Request Time Extension

The timeline shows the following events:

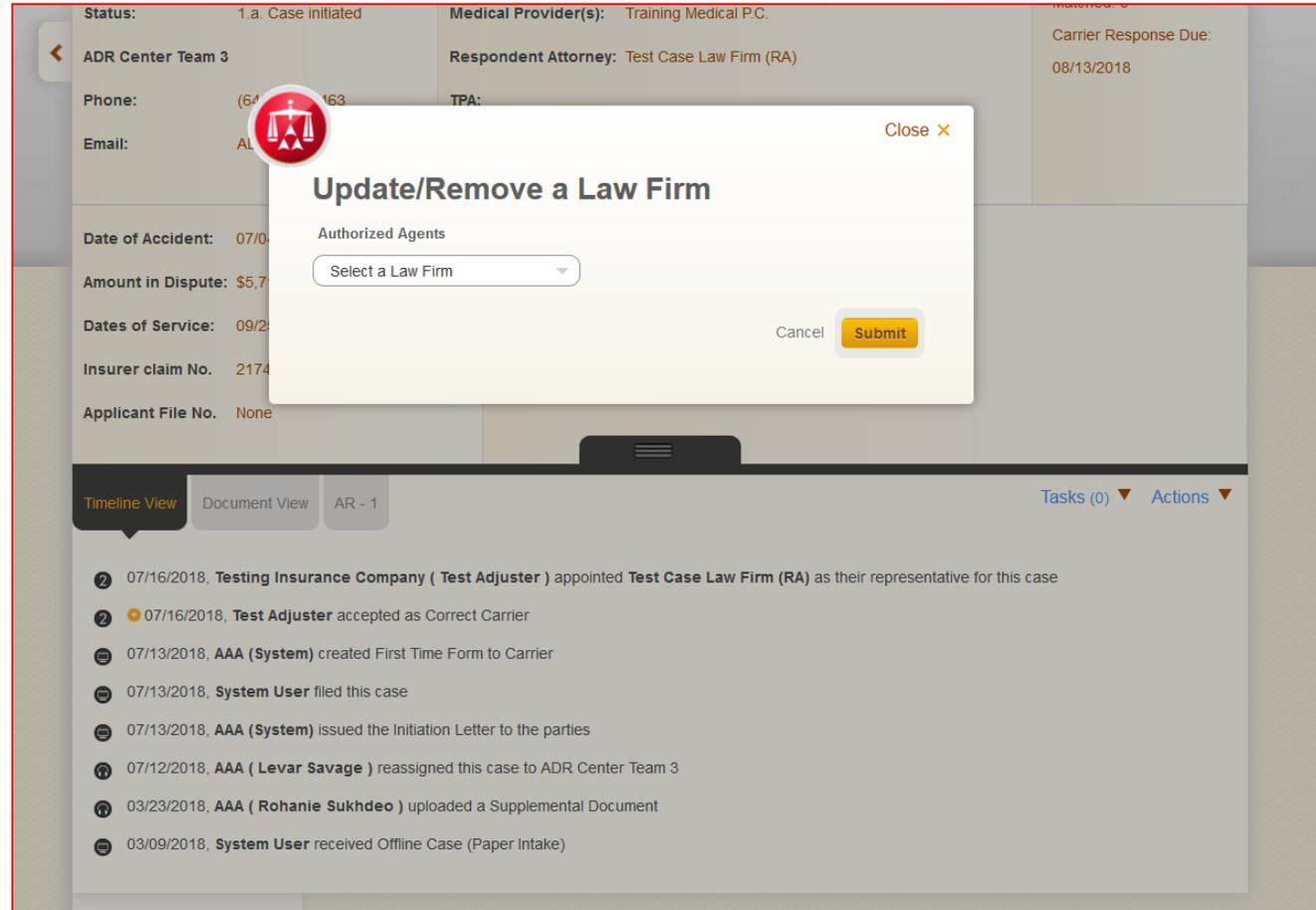
- 07/16/2018, **Testing Insurance Company (Test Adjuster)** appointed **Test Case Law Firm (RA)** as their representative for
- 07/16/2018, **Test Adjuster** accepted as Correct Carrier
- 07/13/2018, **AAA (System)** created First Time Form to Carrier
- 07/13/2018, **System User** filed this case
- 07/13/2018, **AAA (System)** issued the Initiation Letter to the parties
- 07/12/2018, **AAA (Levar Savage)** reassigned this case to ADR Center Team 3
- 03/23/2018, **AAA (Rohanie Sukhdeo)** uploaded a Supplemental Document
- 03/09/2018, **System User** received Offline Case (Paper Intake)

REMOVE A LAW FIRM

A pop-up window will appear to select a law firm.

Please Note: Once a Law Firm has been removed, the ability to manage the case would be revoked from that Law Firm.

Select a law firm from the list of Authorized Agents previously established and click SUBMIT



REMOVE A LAW FIRM

The law firm now has been removed from the case and will no longer have access to manage the case in ADR Center.

All TASKS and ACTIONS pertaining to the case now will be removed from the law firm. Once the removed law firm logs into their ADR Center account, this case will no longer be available in it's user homepage.

Status: 1.a. Case initiated **Medical Provider(s):** Training Medical P.C. **Carrier Response Due:** 08/13/2018

ADR Center Team 3 **Updated/Removed Law Firm successfully, Test Case Law Firm (RA)**

Phone: (646) 663-3463 **TPA:**

Email: ADRCenterTeam3@adr.org **Carrier:** Testing Insurance Company

Date of Accident: 07/04/2012 **Arbitrator:**

Amount in Dispute: \$5,712.00 **Hearings:**

Dates of Service: 09/25/2016 - 09/25/2016

Insurer claim No. 2174169877

Applicant File No. None

Timeline View Document View AR - 1 **Tasks (0)** **Actions**

- 07/16/2018, Testing Insurance Company (Test Adjuster) removed Test Case Law Firm (RA) as Testing Insurance Company's representative for this case
- 07/16/2018, Testing Insurance Company (Test Adjuster) appointed Test Case Law Firm (RA) as their representative for this case
- 07/16/2018, Test Adjuster accepted as Correct Carrier
- 07/13/2018, AAA (System) created First Time Form to Carrier
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REMOVE A LAW FIRM

Once the webpage is refreshed you will find that the Law Firm has been removed from the case caption. Also, you will see that the Law Firm has been removed in the Timeline View.

The screenshot displays a web application interface for case management. At the top, there are navigation tabs for 'Dashboard', 'Tasks', and 'Calendar'. The main header shows the case title: 'Training Medical P.C. / Bill Marroy vs. Testing Insurance Company'. Below this, a grid of fields provides case details:

Case: 41-18-1088-7852	Applicant Attorney: Test & Test Law Firm (CA)	Related cases: Linked: 0 Matched: 0 Carrier Response Due: 08/13/2018
Phase: 1 - Conciliation	Injured Party(ies): Bill Marroy	
Status: 1.a. Case initiated	Medical Provider(s): Training Medical P.C.	
ADR Center Team 3	Respondent Attorney:	
Phone: (646) 663-3463	TPA:	
Email: ADRCenterTeam3@adr.org	Carrier: Testing Insurance Company	

Below the grid, additional case information is listed:

- Date of Accident:** 07/04/2012
- Amount in Dispute:** \$5,712.00
- Dates of Service:** 09/25/2016 - 09/25/2016
- Insurer claim No.:** 2174169877
- Applicant File No.:** None

The interface includes a 'Timeline View' tab, which is currently active. It shows a list of events:

- 07/16/2018, Testing Insurance Company (Test Adjuster) removed Test Case Law Firm (RA) as Testing Insurance Company's representative for this case
- 07/16/2018, Testing Insurance Company (Test Adjuster) appointed Test Case Law Firm (RA) as their representative for this case
- 07/16/2018, Test Adjuster accepted as Correct Carrier
- 07/13/2018, AAA (System) created First Time Form to Carrier
- 07/13/2018, System User filed this case
- 07/13/2018, AAA (System) issued the Initiation Letter to the parties



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