

# E-Subro Hub Mass Reassign Reference Guide

January 2023



# **Table of Contents**

Mass Reassign Access
My Arbfile Page
Menu Links
From User/Business Unit – Step 1
Choose User Tab
Choose Unit Tab
Status Tab
Work to Transfer – Step 2
Choose Demands From List7
Cancel7
Continue7
Previous7
Next
To User/Business Unit – Step 3
Choose User Tab
Choose Unit Tab9
Complete Transfer – Step 4
Cancel9
Confirm 10
Mass Reassign Results



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### **Mass Reassign Access**

To view the "Mass Reassign" menu option, a privilege will need to be assigned to your user login. There are several ways to access the Mass Reassign link.

#### **My Arbfile Page**

From the "My Arbfile" page, click the E-Subro Hub drop-down menu, then "Mass Reassign." While this is the most common path to start a Mass Reassign session, there are other locations on the E-Subro Hub platform.



#### **Menu Links**

E-Subro Hub contains menus with a "Mass Reassign" link. The AF logo on the side menu and the "hamburger" menu at the top-left corner will open a menu tree with the "Mass Reassign" option.





# From User/Business Unit – Step 1

The "Find User/Business Unit" page will show the first step in a bulk assignment by selecting the current owner, which can be an individual associate or business unit.

Note: Before initiating a Mass Reassign, it may be beneficial to create an Open Demand Detail report documenting the list of demands to be moved from the current owner.

#### **Choose User Tab**

The "Choose User" tab allows the user to select a group of demands owned by an individual associate.

Enter one or more pieces of information and press enter or click "Search."

Mass Reassign			
EROM User/Business Unit 2 Work to Transfer	3 TO User/Business Unit Complete transfer		
Find User/Business Unit to transfer FROM Choose User hoose Unit Status			
User Search			Enter one or more pieces of information, and press enter or click 'Search'
Last Name Demander	First Name	Company User ID	Email
City	State	Zip	
	Sear	ch Reset	

Click on the correct associate result. If there are no demands or tasks owned by the selected associate, a notification will appear.

ose User Choose Unit :	Status						
			Search Again				
			11 users found. Select a us	er to proceed.			
User ID 🖨	First Name 🗘	Last Name 🗢	Email 🗢	Mailing Address 🗢	City 🗢	State 🗘	Zip ‡
jdemandert01	JIM	DEMANDER	jkennedy@arbfile.org	10219 N Valle Dr	Tampa	FL	33612
jdemander.alpha	JOHN	DEMANDER	rbasava@arbfile.org	3350 Buschwood Park Dr	Tampa	FL	33618
lalmengu.04513	LYN	DEMANDER	test@arbfile.org	3820 Northdale Blvd	Tampa	FL	33624
sdemanader.04513	SALLY	DEMANDER	sdemander@alpha.com				
xdemander.alpha	XENA	DEMANDER	msinha@arbfile.org	3350 Buschwood Park Dr	Tampa	FL	33618
zdemander.04513	ZACHARY	DEMANDER	bkollasch@arbfile.org	350 5th Ave	New York	NY	10118
adamaa dad 04513	74515	DEMANDED	tools If a stift of a stift of a star	2250 Durshunsed Dark De	T	<i>e</i> ,	22510
jdemander.04513	JACK1	DEMANDER1	emoser@arbfile.org	3350 Buschwood Park Dr	Tampa	FL	33618

#### **Choose Unit Tab**

The "Choose Unit" tab allows the user to select a group of demands owned by a business unit.

Enter a business unit name to narrow the search or select a business unit from the visible list.

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Click on the correct business unit name. If there are no demands or tasks owned by the selected business, a notification will appear.

Mass Reassign				
1 FROM User/Business Unit	2 Work to Transfer	3 TO User/Business Unit	4 Complete transfer	
nd User/Business Ur	nit to transfer FROM	1		
Choose Use Choose Unit	atus			
Business Unit Filte	r			
Filter by Business Unit Name Routing				
Showing 5 of 32 Business Un	.ts. Select one to proceed.			
Business Unit Name 🖨				
Demo Routing Unit				
Northeast Routing Unit				
Northwest Routing Unit				
Southeast Routing Unit				
Southwest Routing Unit				

#### **Status Tab**

The "Status" tab allows the user to view the status of previous assignment events.

1 FROM User/Business Unit	2 Work to Transfer To User/Business Unit	4 Complete transfer			
d User/Business Unit	to transfer FROM				
d OSCI/ Dusiness Onic					
hoose User Choos Unit S	tatus				
Reassignment Status	5				
-					
	5 the last mass reassignment initiated by you and any in pro	ogress mass reassignment for your company. Refresh 🗧	9		
		ogress mass reassignment for your company. Refresh 🗧			
		gress mass reassignment for your company, Refresh € From User/Business Unit	7 To User/Business Unit	Status	
The below table provides detail on	the last mass reassignment initiated by you and any in pro		•	Status Completed	
The below table provides detail on Date initiated	the last mass reassignment initiated by you and any in pro Initiated By User	From User/Business Unit	To User/Business Unit		
The below table provides detail on Date initiated 12/16/2022 14:43	the last mass reassignment initiated by you and any in pro	From User/Business Unit ZANE DEMANDER	To User/Business Unit ZACHARY DEMANDER	Completed	
The below table provides detail on Date initiated 12/16/2022 14:43 12/16/2022 12:28	the last mass reassignment initiated by you and any in pro- Initiated By User JOHN DEMANDER JACKI DEMANDERI	From User/Business Unit ZANE DEMANDER JOHN DEMANDER	To User/Business Unit ZACHARY DEMANDER COMMERCE DEMANDER	Completed Error	
The below table provides detail on Date initiated 12/16/2022 14:43 12/16/2022 12:28 12/16/2022 12:27	the last mass reassignment initiated by you and any in pro	From User/Business Unit ZANE DEMANDER JOHN DEMANDER Clerical	To User/Business Unit ZACHARY DEMANDER COMMERCE DEMANDER ZACHARY DEMANDER	Completed Error Completed	
The below table provides detail on Date initiated 12/16/2022 14:43 12/16/2022 12:28 12/16/2022 12:27 12/16/2022 11:17	the last mass reassignment initiated by you and any in pro Initiated By User JOHN DEMANDER JACKI DEMANDER JACKI DEMANDERI JACKI DEMANDERI	From User/Business Unit ZANE DEMANDER JOHN DEMANDER Clerical JOHN DEMANDER	To User/Business Unit ZACHARY DEMANDER COMMERCE DEMANDER ZACHARY DEMANDER COMMERCE DEMANDER	Completed Error Completed Error	
The below table provides detail on Date initiated 12/16/2022 14:43 12/16/2022 12:28 12/16/2022 12:27 12/16/2022 11:17 12/16/2022 11:27	the last mass reassignment initiated by you and any in pro Initiated By User JOHN DEMANDER JACKI DEMANDERI JACKI DEMANDERI JACKI DEMANDERI JACKI DEMANDER	From User/Business Unit ZANE DEMANDER JOHN DEMANDER Clerical JOHN DEMANDER Subor Team 1	To User/Business Unit ZACHARY DEMANDER COMMERCE DEMANDER ZACHARY DEMANDER COMMERCE DEMANDER Subro Team 2	Completed Error Completed Error Completed	
The below table provides detail on Date initiated 12/16/2022 12-43 12/16/2022 12-28 12/16/2022 12-27 12/16/2022 12-27 12/16/2022 12-23	the last mass reassignment initiated by you and any in pro Initiated By User JOHN DEMANDER JOKN DEMANDER JOKN DEMANDER JOHN DEMANDER JOHN DEMANDER JOHN DEMANDER	From User/Business Unit ZANE DEMANDER Clerical JOHN DEMANDER Subro Team 1 ZACHARY DEMANDER	To User/Business Unit ZACHARY DEMANDER COMMERCE DEMANDER ZACHARY DEMANDER COMMERCE DEMANDER Subro Team 2 ZANE DEMANDER	Completed Error Completed Error Completed Completed	
The below table provides detail on Date initiated 12/16/2022 14-43 12/16/2022 12-28 12/16/2022 12-27 12/16/2022 12-23 12/16/2022 12-23 12/16/2022 12-09	the last mass reassignment initiated by you and any in pro- initiated By User JOHN DEMANDER JACKI DEMANDERI JOHN DEMANDERI JOHN DEMANDERI JOHN DEMANDERI JOHN DEMANDER	From User/Business Unit ZANE DEMANDER JOHN DEMANDER Clerical JOHN DEMANDER Subro Team 1 ZACHARY DEMANDER ZANE DEMANDER	To User/Business Unit ZACHARY DEMANDER COMMERCE DEMANDER COMMERCE DEMANDER Subro Team 2 ZANE DEMANDER ZACHARY DEMANDER	Completed Error Completed Error Completed Completed Completed	

# Work to Transfer – Step 2

The "Work to Transfer" page will show the second step to a bulk assignment by selecting the demands to be moved. To move the entire inventory, simply click "Next."



Mass Reassign		
1 2 3	4	
FROM User/Business Unit Work to Transfer TO User/Business Unit	Complete transfer	
Select Demands		
Choose work items to be transferred FROM Subrogation		
216 of 216 Demands selected     Choose Demands from List     0 Add Evidence Task		
0 Appraiser Damage Task		
	< Previou Next >	

#### **Choose Demands From List**

"Choose Demands From List" will allow the user to select a portion of the inventory for assignment by activating filters to narrow the list.

The filters are similar to the filter options available for a Custom Search and will not be reviewed in detail in this document. However, the most common filter options would be Role (Demander or Responder) and Demand Status (Outstanding or Closed).

Click the "Apply Filters" button when the filters are selected to return a list of demands

Individual demands can be selected by clicking the check box to the left of the row.

All the demands on the page can be selected by clicking the check box at the top of the column or by clicking "Select all # demands" in the column header to highlight all the demands in the current list.

Clicking "Clear All" in the column header will remove the current highlighted demands.

"Cancel" will return the user to the prior page and delete any selections. "Continue" will move the user to the second step page where the number of demands will be listed.

Mass Reassign													
1 FROM User/Business Unit	2 Work to T			TO User)	3 /Business Unit		4 Complete transfer						
Demand Listing	< c.	ancel	Conti	nue >			Demand L	isting		4 Demand(s) selected <u>Sele</u>	ct all 18 deman	ıds <u>Clear All</u>	Fu
		My Role ⊜		Sort By:	• •		Claim # ≑	Date Issued ≑ Status ≑	Opposing Party ≑ Admin ≑	Original Amt 🗢		Last Action Last Action Days	Owner ≑ Days Issued ≑
Selected Filters		D			<b>II</b> 46		KM-20221117-211839-D	11/17/2022 Issued	BETA INSURANCE OF COLORADO	\$392.25	\$392.25	Issued 33 day(s)	JACK1 DEMANDER1 33 day(s)
Role * Status *		D					KM20220705-D2	07/05/2022 Issued	BETA INSURANCE CO	\$4,350.00	\$4,350.00	Issued 169 day(s)	JACK1 DEMANDER1 169 day(s)
Role  Demander		D			- <b>1</b> 2	2	AC202205261150-D	05/26/2022 In Negotiation	BETA INSURANCE OF COLORADO	\$3,562.00	\$3,042.00 \$3,042.00	Rejected Payment 173 day(s)	JACK1 DEMANDER1 209 day(s)
Demand Status		D			- <u>1</u>	20	kw-050420220238	05/04/2022 Accepted	BETA INSURANCE OF COLORADO	\$3,500.00	\$3,500.00 \$3,500.00	Accepted (R) 231 day(s)	JACK1 DEMANDER1 231 day(s)
Outstanding 🗾 🧵		D			I	24	aa-20210921-0616-D	09/21/2021 Issued	BETA INSURANCE OF COLORADO	\$3,502.00	\$3,502.00	Issued 455 day(s)	JACK1 DEMANDER1 455 day(s)
Issue Date			1000				33-20210021-0854-D	09/21/2021	BETA INSURANCE OF	\$2.500.00	\$2 500.00	leenad	IACK1 DEMANDED1

#### **Previous**

The "Previous" option will move the user to the prior step.

#### Next

The "Next" option will move the user to the next step with the selected list of demands.



Mass Reassign	2 Work to Transfer	3 TO User/Büsiness Unit	4 Complete transfer	
Select Demands				
Choose work items to be t 28 of 216 Demands selec 0 Add Evidence Task 0 Appraiser Damage Tas	Choose Demands fro			
			< Previous Next >	

# **To User/Business Unit – Step 3**

The "To User/Business Unit" page will show the third step to a bulk assignment by selecting the new owner, which can be an individual associate or business unit.

#### **Choose User Tab**

The "Choose User" tab allows the user to assign the demands to an individual associate.

Enter one or more pieces of information and press enter or click "Search."

Click on the correct associate result.

Mass Reassign						
1 FROM User/Business Unit	2 Work to Transfer	3 TO User/Business Unit	4 Complete transfer			
The following work items 28 Demand(s)	from Subrogation are	e selected for reassign	iment.			
Find User/Business Un Choose User Choose Unit	it to transfer TO					
User Search						Enter one or more pieces of information, and press enter or click 'Search'
Last Name Adjuster		First Name		Company User ID		Email
City			State	•	Zip	
			Search	Reset		

Click on the correct associate result.



Mass Reassign							
FROM User/Business Unit	2 Work to Transfer	3 TO User/Business Unit	4 Complete transfer				
The following work iten 28 Demand(s)	ns from Subrogation	are selected for reassignm	ient.				
Find User/Business U	nit to transfer TO						
			Search A 1 user found. Select th				
User ID 🖨	First Name 🛱	Last Name 🖨	Email 🗇	Mailing Address ≑	City \$	State ≑ Zip ≑	
radjuster.04513	ROBIN	ADJUSTER-04513	cjaster@arbfile.org	3820 Northdale Blvd	Tampa	FL 33624	

#### **Choose Unit Tab**

The "Choose Unit" tab allows the user to assign the demands to a business unit.

Enter a business unit name to narrow the search or select a business unit from the visible list.

Click on the correct business unit name.

Ma	ass Reassign					
	1 FROM User/Business Unit	2 Work to Transfer	3 TO User/Business Unit	4 Complete transfer		
	PROM User/Business Unit	WORK to transier	TO User/Business Unit	Complete transier		
	The following work items fi	rom ROBIN ADJUS	TER-04513 are selected fo	r reassignment.		
	1 Demand(s)					
	i Demand(3)					
Fir	nd User/Business Unit	to transfer TO				
с	choose Us Choose Unit					
	Business Unit Filter					
	Filter by Business Unit Name				7	
	Routing					
	Showing 5 of 32 Business Units. S	select one to proceed.				
	Business Unit Name 🗘				Company Name 🗇	
	Demo Routing Unit				ALPHA INSURANCE CO	
	Northeast Routing Unit				ALPHA INSURANCE CO	
	Northwest Routing Unit				ALPHA INSURANCE CO	
	Southeast Routing Unit				ALPHA INSURANCE CO	
	Southwest Routing Unit				ALPHA INSURANCE CO	

# **Complete Transfer – Final Step**

The "Complete Transfer" page will show the final step to a bulk assignment by confirming the "From" ownership, the "To" ownership and the number of demands to be moved.

#### Cancel

"Cancel" allows the user to return to a prior step or discontinue the process.



#### Confirm

"Confirm" allows the user to complete the transfer process.

Mass Reassi	gn					
1 FROM User/Business	s Unit Work to Transfer	3 TO User/Business Unit	4 Complete transfer			
Review Transfe	er					
Transfer selecte	d work items					
FROM SL	brogation					
TO RO	DBIN ADJUSTER-04513					
28 Demand(s)						
	-		< Cancel Co	nfirm >		

# **Mass Reassign Results**

The "Mass Reassign Results" page will allow the user to view the status of the transfer, or click "Ok" to move to another E-Subro Hub task.

