

E-Subro Hub My Tasks List Reference Guide

January 2023



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My Tasks List

The ability to see the "My Tasks List" menu option requires a company-wide configuration setting and is available to all users if active for the company.

My Arbfile Page

From the My Arbfile page, click the E-Subro Hub dropdown menu, then "My Tasks." This would be the most common path to start a My Tasks List session, but there are other locations on the E-Subro Hub platform.



Menu Links

There are menus that will present a My Tasks link. The AF logo on the side menu and the "hamburger" menu at the top left corner will open a menu tree with the "My Tasks" option.





Task List Page

This page will show the demands that have a pending task for the user. The default filters for this list are tasks assigned to an associated business unit or the claim handler directly. The status of the task would be "Open."

*	Task List	Task Listing: My Tasks							Excel Export
÷	Cast refreshed at 11:40:23 AM	TPA © Opposing Party ©	Claim # 🗸	Date Assigned 🖗	Assigner ¢	Assignee @	Task 🗢	Task Status 🌣	Actions
2		BETA INSURANCE OF COLORADO	KM-20221115-190801-D	01/04/2023	JACK1 DEMANDER1	ROBIN ADJUSTER-04513	Add Evidence	OPEN	1
	Selected Filters	BETA INSURANCE OF COLORADO	Basava-20210601-1204-D	01/04/2023	JACK1 DEMANDER1	Demo Routing Unit	Verify Damage Amounts	OPEN	1
	Role * Status *	BETA INSURANCE OF COLORADO	aa-20220105-1020-R	01/04/2023	JACK1 DEMANDER1	ROBIN ADJUSTER-04513	Add Evidence	OPEN	1
2	Role	BETA INSURANCE OF COLORADO	aa-20210921-1330-D	01/04/2023	JACK1 DEMANDER1	Demo Routing Unit	Verify Damage Amounts	OPEN	I
r	Task Type ^ None Selected •								
	Open -								

Task List Filter

There are three filter options for the Task List.

Role can be set to "Assigned to Me," "Assigned to Business Unit or Me," or "I am the Assigner."

Task Type can be set to "Add Evidence" or "Verify Damage Amounts."

Task Status includes several options.

Open: The task is pending.

In Process: The task has been reviewed, but not marked as complete.

Reassigned: The task was reassigned from the original recipient

Pending Acceptance: The demand has been moved to this status due to a Settlement Exchange System[®] (SES[®]) trigger event.

Completed: The task has been marked complete.

Rejected: The task has been declined by the assigned user and generally involves a TPA workflow.

Errored: An evidence upload malfunction has occurred.



*	Task List	Task Listing: My Tasks						(Excel Export
÷	Cast refreshed at 5:50:13 PM	TPA ⊕ Opposing Party ⊕	Claim # 👻	Date Assigned ≑	Assigner 🖨	Assignee 🕸	Task 🗢	Task Status 🗘	Actions
a	502	BETA INSURANCE OF COLORADO	KM-20221115-190801-D	01/04/2023	JACK1 DEMANDER1	ROBIN ADJUSTER-04513	Add Evidence	OPEN	I
	Selected Filters	BETA INSURANCE OF COLORADO	Basava-20210601-1204-D	01/04/2023	JACK1 DEMANDER1	Demo Routing Unit	Verify Damage Amounts	OPEN	:
Ê	Role * Status *	BETA INSURANCE OF COLORADO	aa-20220105-1020-R	01/04/2023	JACK1 DEMANDER1	ROBIN ADJUSTER-04513	Add Evidence	OPEN	:
2 A	Role Assigned to Bus. Un* Task Type None Selected * Status ^	BETA INSURANCE OF COLORADO	aa-20210921-1330-D	01/06/2023	ROBIN ADJUSTER-04513	Demo Routing Unit	Verify Damage Amounts	OPEN	I
	Open Open In Process Reassigned Pending Acceptance Completed Rejected Errored								

Click "Apply Filters" if the options are revised to create a different list. Selected filters can be removed with a single click of "Clear." Individual filters can be removed by clicking the corresponding trash can icon.

	Task List	Task Listing: My Tasks							Excel Export
	C Last refreshed at 11:40:23 AM	TPA ⊕ Opposing Party ⊕	Claim # 🗸	Date Assigned 🕀	Assigner 🗢	Assignee 🗢	Task 🗢	Task Status 🗘	Action
	502	BETA INSURANCE OF COLORADO	KM-20221115-190801-D	01/04/2023	JACK1 DEMANDER1	ROBIN ADJUSTER-04513	Add Evidence	OPEN	1
Se	elected Filters	BETA INSURANCE OF COLORADO	Basava-20210601-1204-D	01/04/2023	JACK1 DEMANDER1	Demo Routing Unit	Verify Damage Amounts	OPEN	:
6	ole * Task Type * Status *	BETA INSURANCE OF COLORADO	aa-20220105-1020-R	01/04/2023	JACK1 DEMANDER1	ROBIN ADJUSTER-04513	Add Evidence	OPEN	1
Tai	ke Assigned to Bus. Un	BETA INSURANCE OF COLORADO	aa-20210921-1330-D	01/04/2023	JACK1 DEMANDER1	Demo Routing Unit	Verify Damage Amounts	OPEN	I
	Open 🔹 🔳								
	Apply Filters								

Task List Columns

There are nine columns on the "Task List" page and can be sorted by clicking at the top of the column.

TPA: This indicates the demand is currently assigned to an administrator.

Opposing Party: This is the other party that is involved in the claim.

Claim Number: This is the claim number that was entered for the user's internal file and is an active link to open the demand.

Date Assigned: This is the date the task assignment was initiated.

Assigner: This is the person who initiated the task assignment.

Assignee: This is the person or business that was assigned the task.



Task: This is the task that was assigned. This is an active link to the location where the task can be reviewed and marked complete.

Task Status: This shows the current status of the assigned task and corresponds to the Status filter options.

Actions: This is a quick link to change the status of the assigned task.

*	Task List	Task Listing: My Tasks							Excel Export
÷	Last refreshed at 11:40:23 AM	TPA ⊕ Opposing Party ⊕	Claim # 🗸	Date Assigned 🗘	Assigner ©	Assignee \$	Task 🗢	Task Status 🗘	Actions
२		BETA INSURANCE OF COLORADO	KM-20221115-190801-D	01/04/2023	JACK1 DEMANDER1	ROBIN ADJUSTER-04513	Add Evidence	OPEN	Set Task to in Process
	Selected Filters	BETA INSURANCE OF COLORADO	Basava-20210601-1204-D	01/04/2023	JACK1 DEMANDER1	Demo Routing Unit	Verify Damage Amounts	OPEN	~
	Role * Task Type * Status *	BETA INSURANCE OF COLORADO	aa-20220105-1020-R	01/04/2023	JACK1 DEMANDER1	ROBIN ADJUSTER-04513	Add Evidence	OPEN	Set Task to Completed
2	Role	BETA INSURANCE OF COLORADO	aa-20210921-1330-D	01/04/2023	JACK1 DEMANDER1	Demo Routing Unit	Verify Damage Amounts	OPEN	1
A	Task Type								
	Status ^ Open •								

The top ribbon has a link to export the Task List to an Excel document.

The "Refresh" icon will update the "Task List" page.

The bottom ribbon will show the current page for the list. The number of demands per page can be set to 5, 10, 25, or 50.

eg refreshed at 5:50 / M	TPA Opposing Party	Claim # 🗸	Date Assigned 🗢	Assigner \$	Assignee \$	Task 🌣	Task Status 🗢	Actio
<u> </u>	BETA INSURANCE OF COLORADO	KM-20221115-190801-D	01/04/2023	JACK1 DEMANDER1	ROBIN ADJUSTER-04513	Add Evidence	OPEN	:
Selected Filters	BETA INSURANCE OF COLORADO	Basava-20210601-1204-D	01/04/2023	JACK1 DEMANDER1	Demo Routing Unit	Verify Damage Amounts	OPEN	:
Role * Status *	BETA INSURANCE OF COLORADO	aa-20220105-1020-R	01/04/2023	JACK1 DEMANDER1	ROBIN ADJUSTER-04513	Add Evidence	OPEN	:
Role	BETA INSURANCE OF COLORADO	aa-20210921-1330-D	01/06/2023	ROBIN ADJUSTER-04513	Demo Routing Unit	Verify Damage Amounts	OPEN	:
Assigned to Bus. Un								
Task Type								
None Selected 👻								
Status								
Open 🗾 🔳								
						_		
					1			
					5			
					10			
					25			
					50			

Verify Damage Amounts Task

The "Verify Damage Amounts" task can be completed by clicking the "Task" column link to the "Damages Worksheet" page. However, use of the actual worksheet would be an internal PD review workflow.



≡	E-SubrolHub	Overview Negotiate	Manage Assign Diary				ROBIN ADJUS radjuster.0451	ГЕR-04513 З
*	Demand Overview	🛱 🎦 🚔	- 81 - 8			📕 0 🚨 🖩		
日 Q 自 型	C C C C C C C C C C C C C C C C C C C	Assigned Task Date Assigned: 1/4/7 Assigner: JACK1 DEM Assignee: Demo Rou	ksheet or internal use, to be comple Information MANDER1	eted by the individual appra	ising damages.	* Task State Open	105 ¥	
	 BETA INSURANCE CO (SDFASDF WSDFDSF) Claim# (D): Basava-20210601-1204-R Demand Amt (D): \$2,500.00 	Task Message:	Original Damages 06/01/2021	Appraised Damages		Comple Open In Proc		
	Demand Amt (D): 52,500.00	Auto Damage	\$2,500.00	Not Entered				J
	R ALPHA INSURANCE CO (ASDFASDF SRFDASDFSD)	Rental Towing	\$0.00 \$0.00	Not Entered Not Entered				
	Claim# (R): Basava-20210601-1204-D Last Offer (R):	Other Amount Deductible Salvage Recovery	\$0.00 \$0.00 \$0.00	Not Entered N/A Not Entered				
	View Damages & Liability	Total	\$2,500.00	N/A				
		Edit Worksheet	Back to Task List					

Add Evidence Task

The "Add Evidence" task can be flagged as "complete" by the clicking the "Task" column link to the evidence section of the demand's "Overview" tab.

≡	E-SubroHub	Overview Negotiate Manage Assign Diary				ROBIN ADJUSTER-04513 radjuster.04513
*	Demand Overview				e 🕰	🗉 🗄 🖎
÷	6 8 0					
Q	Demand ID: 312321 Loss State - Date: KS - 02/24/2020 Issued	Attached Evidence				-
自 住	QUICK ACTIONS	Assigned Task Information You have been assigned the task(s) of adding evide to Once addee Flag Complete : Orig - \$784.50 Task Message:	d, flag the appropriate task as complete.			
A	ALPHA INSURANCE CO (GERI BESKID) Claimt (D): KM: 2022115-190001-D Demand Amt (D): \$392.25	Drop or browse for files		Search Evidence Search Filter by Evidence Type Select Evidence Type(s)	Q	
	BETA INSURANCE CO (KARL) Claim# (R):	File Name	Method	For Damages	Added By	Actions

Return to Task List Page

To return to the "Task List" page from a demand, click the AF logo on the left side of the page, then "My Tasks" on the menu.



Demand Overview O O O	Overview Negotore Manage Assign Gury	Hember Access ~ E-Subro Hub A About E-Subro Hub	Overview Negotiate	Manage Assign Diary				
Considerer Durce Tr 60/07/2023 Norwell Considerer Durce Tr 60/07/202 Norwell Considerer Durce Tr	Description Description <thdescription< th=""> <thdescription< th=""></thdescription<></thdescription<>	Training Domand Search Mass Beassign My Domandis A My Hunk List My Hunk List Bey Wook List Report	Damages Worksheet The as Trackets for internal one, to be completed by the individual approximg damages. Assigned Task information The Assignment (APC) Response (APC) EXAMPLE Assignment Development Assignment Assignment Development Assignment Assign					
Claime (0): Basere 20220001-3204-8 Demaind Arth (0): \$2,500.00	Assigned Task Information See support (VI) Inform 2004 (Instance) Anglemen away tool See See See See See See See See See See	Insued Demands Pre-Issued Demands No Response Demands	Task Hessage: Auto Damage	Original Damages 06/01/2022 \$2,500.00	Appraised Damages			
ALPHA INSJRANCE CO (ASPASOF SEFDASOFED) Claim (10) Bastere 2020/BIOL-1264-D Last Offer (20):	ID Departing in text.com Approximate (Examples) Auto Example Station (Examples) Not Channel Wanal 55:00 Not Channel Taning 50:00 Not Channel	Al Responses Custom My Teon Quick Acogn	Rental Towing Other Amount Deductible Salvage Recovery	\$2,5000 \$0,00 \$0,00 \$0,00 \$0,00	Not Entered Not Entered Not Entered N/A Not Entered			
View Damages & Liability	towning 3-0.00 Not Intered Other Amuret 50.00 Not Intered Deduction 6.00 Min	My Tasks	Salvage Necovery Total	\$2,500.00	Not Entered			

If visible, click "Back to Task List."

Lissued QUICK ACTIONS		r internal use, to be comple	ted by the individual appra	ising damages.
ALPHA INSURANCE CO (ASDFASDF SRFDASDFSD) Claim# (D): Baswa-30210601-1204-D	Assigned Task I Date Assigned: 1/16/ Assigner: ROBIN ADJ Assignee: Demo Rout Task Message:	23 USTER-04513		★ Task Status Open
Demand Amt (D): \$2,000.00		Original Damages 06/01/2021	Appraised Damages	
GEICO CORPORATE GROUP (WERFASDFSDF WEFASDFASDF)	Auto Damage	\$2,000.00	Not Entered	
Claim# (R): Basava-20210601-1204-G	Rental	\$0.00 \$0.00	Not Entered Not Entered	
	Other Amount	\$0.00	Not Entered	
View Damages & Liability	Deductible Salvage Recovery	\$0.00 \$0.00	N/A Not Entered	
	Total	\$2,000.00	N/A	
	Appraisal Not	Back to Task List		

Clicking the "Back to List" or the "Get Next Work" options from the demand will return the user to the primary "Work List" page, and not the "My Tasks" page.

	Overview Negotiate Manage Assign Diary	
Loss State - Date: AR - 09/05/2021 Issued	Add Leafurer Series Ser	10
	Original Damages: \$3,500.00 Damages Worksheet	
BETA INSURANCE CO (TRAVELER)	This is a Worksheet for internal use, to be completed by the individual appraising damages. Assigned Task Information Date Assigned: 1/6/23 *Task Status	
Claim# (D): aa-20210921-1330-R Demand Amt (D): \$3,500.00	Assigner: Demo Routing Unit Task Message:	

My "Work List" page may display pending task assignments, but can include any other demands needing attention.



*	Worklist	My Work	klist 🚯									Excel Export	Full 🔻
÷	Last refreshed at 1:14:45 PM	My Role 🗘	Sort	r 🔳 🕶		Claim # \$	Date Issued Status	Opposing Party \$ Admin \$	Original Amt 🗢		Last Action Last Action Days	Owner Days Issued	Actions
۹	My Worklist Custom	D	9	2 🗉 🕸		KM-20221115-190801-D	11/15/2022 Issued	BETA INSURANCE OF COLORADO	\$392.25		Supplement Issued 7 day(s)	JACK1 DEMANDER1 50 day(s)	÷
Ê	Issued Pre-Issued	R 📕	9	2 🗉 🖉		aa-20220105-1020-R	01/05/2022 Issued	BETA INSURANCE OF COLORADO	\$1,452.00	\$1,452.00	Issued 365 day(s)	Subrogation 365 day(s)	:
12	No Response All Responses	R 📕	9	2 🗉 ₫		aa-20210921-1330-D	09/21/2021 Issued	BETA INSURANCE OF COLORADO	\$3,500.00	\$3,500.00	Issued 471 day(s)	Subrogation 471 day(s)	:
_	Role	R 📕	0	2 🗉 🕸	2	Basava-20210601-1204-D	06/01/2021 Issued	BETA INSURANCE OF COLORADO	\$2,500.00	\$2,500.00	Issued 583 day(s)	Subrogation 583 day(s)	:
Δfλ.	None Selected	R 📁	0	2 🗉 ₫	20	112320200745AC-D	12/30/2020 Issued	BETA INSURANCE OF COLORADO	\$8,500.00	\$8,500.00	Issued 736 day(s)	Subrogation 736 day(s)	÷
	None Selected -	R 📕	9	2 🗉 🖉		121420200115AC-D	12/30/2020 Issued	BETA INSURANCE OF COLORADO	\$8,500.00	\$8,500.00	Issued 736 day(s)	Subrogation 736 day(s)	:
	Additional Filters	R 📕	0	2 🗉 ₫	20	KAJ20200206A	02/26/2020 Issued	BETA INSURANCE OF COLORADO	\$5,265.00		Supplement Issued 15 day(s)	Subrogation ① 1044 day(s)	:
	None Selected	D 🕨	0	2 🗹 🖉		LL-20220307-1531-D	03/07/2022 Issued	BETA INSURANCE CO	\$10,000.00		Issued 304 day(s)	ROBIN ADJUSTER-04513 304 day(s)	:
		D 🕨	9	5 m r	2	kaj20220720demander	07/20/2022 Issued	BETA INSURANCE OF COLORADO	\$9,000.00	\$9,000.00	Issued 169 day(s)	ROBIN ADJUSTER-04513 169 day(s)	÷
	View Another User's Worklist Select User	R 🏴	9			Basava-20211213-1352-D	02/04/2022 Issued	BETA INSURANCE OF COLORADO	\$7,500.00	\$7,500.00	Issued 335 day(s)	Subrogation 335 day(s)	: