

Deferred Cases

Add/Edit Features
and
Edit Damages

Total Recovery Solution[®] (TRS[®])

Integrity

Accountability

Passion

Achievement



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Membership driven. Innovation focused.

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Deferment Request Basics



Deferment: A postponement of a case being heard for one-year from the date of filing.

Withdraw

The requesting party can **withdraw** the deferment anytime prior to hearing.

Challenge

Any party named in the case may **challenge** the deferment. If challenged, the case will transition to hearing, where the arbitrator will rule either to allow or not allow the deferment.

Amend


Cases where deferments have been challenged, withdrawn, or expired can be **amended** depending on how the case was submitted*.

[*Learn more about case submission types](#)

Terms & Definitions

The terms and definitions below are intended to help parties decide what type of case they want to submit when there is a deferment possibility.


Initial Submission

An initial submission is when a deferment is **added with or during** the initial case and is requested prior to selecting the **Submit** tab  .



When a deferment ends, this submission type requires the case to be resubmitted to be viewable by the arbitrator. Parties can simply review case details, amend the case to include new information, or edit information previously entered.

Final Submission

A final submission is when a deferment is added **AFTER** the Submit tab  is selected.



When a deferment ends, this submission type does not allow parties to amend previously entered information into the case. The case and the original information entered remains final and cannot be changed.

Case Submission Types

The ability to amend a TRS case **after** a deferment is **withdrawn** depends on how the original case was submitted. The two case submission types are:

Initial Submission

When a deferment is added **with or during** the initial case submission.

Amendments



Final Submission

When a deferment is added **AFTER** the case submission.

No Amendments



[Learn more about these terms/definitions.](#)



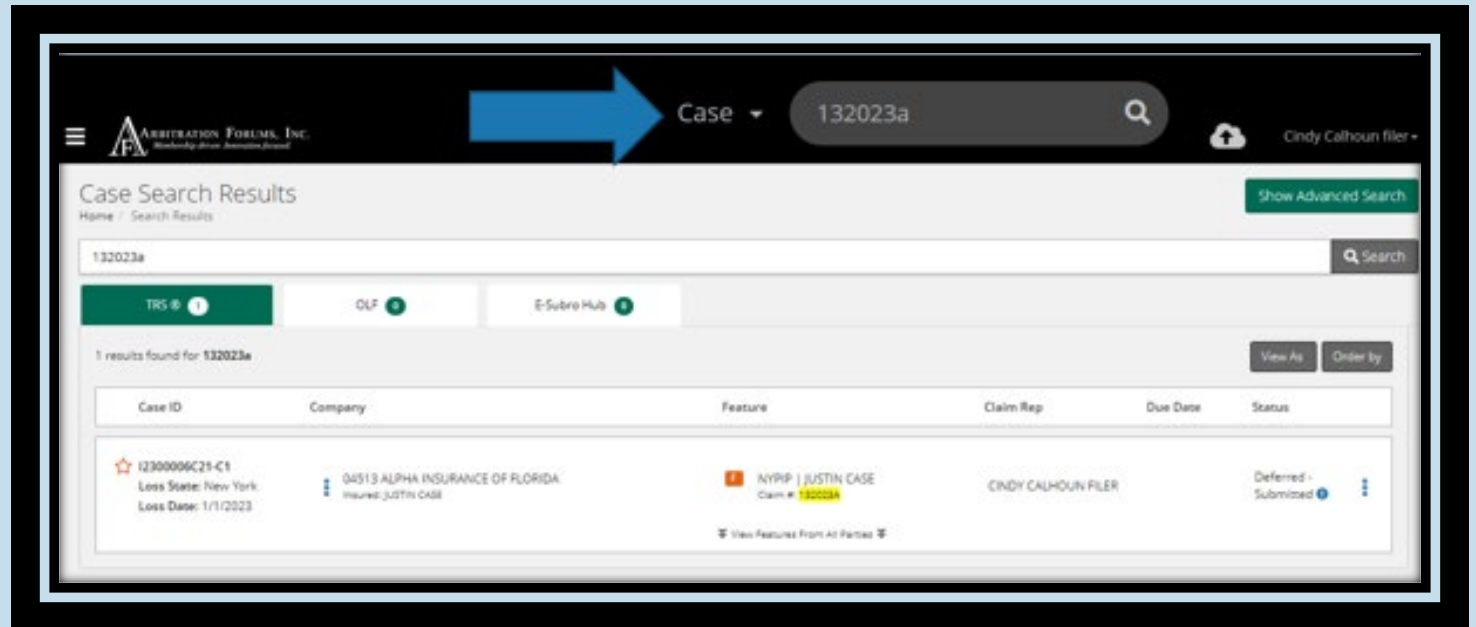
Add/Edit Features

Case Deferred: Add/Edit Feature

To add/edit features **after** the case is deferred, enter one of the following criteria in the search field provided.

Enter *one* of the following:

- Case ID
- Claim Number
- Policy Number
- Internal Reference Data



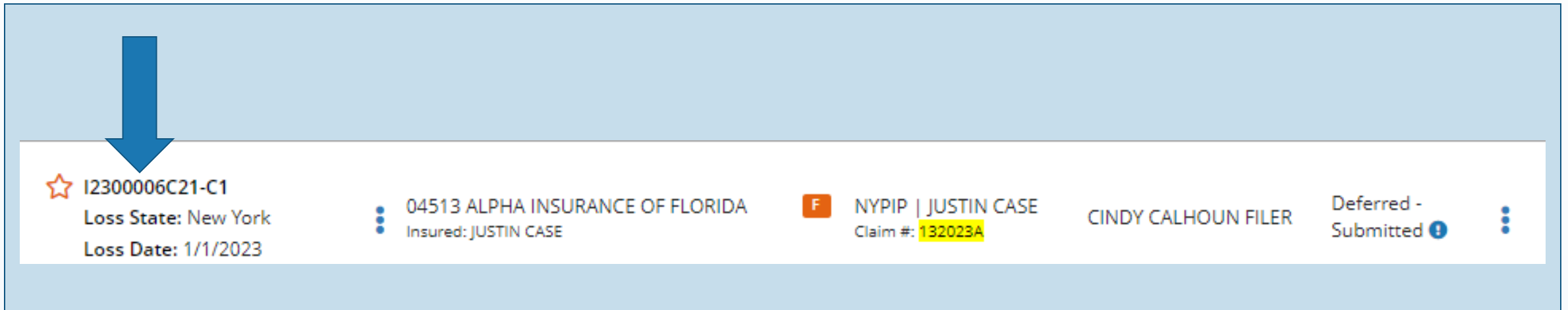
The screenshot displays the 'Case Search Results' page. At the top, there is a search bar with a dropdown menu set to 'Case' and the search term '132023a'. A blue arrow points to this search bar. Below the search bar, there are tabs for 'TRS #', 'OLF', and 'E-Subro Hub'. The search results section shows '1 results found for 132023a'. The results table has columns for Case ID, Company, Feature, Claim Rep, Due Date, and Status. The single result is for Case ID 12300006C21-C1, Company 04513 ALPHA INSURANCE OF FLORIDA, Feature NYPIP | JUSTIN CASE, Claim Rep CINDY CALHOUN FILER, and Status Deferred - Submitted.

Case ID	Company	Feature	Claim Rep	Due Date	Status
12300006C21-C1 Loss State: New York Loss Date: 1/1/2023	04513 ALPHA INSURANCE OF FLORIDA Insured: JUSTIN CASE	NYPIP JUSTIN CASE Claim # 132023a	CINDY CALHOUN FILER		Deferred - Submitted



Case Deferred: Add/Edit Feature

After the case is located, go to the **Case Overview** page by selecting the AF Case ID number.



The screenshot shows a case card with the following information:

- Case ID:** I2300006C21-C1 (highlighted by a blue arrow)
- Loss State:** New York
- Loss Date:** 1/1/2023
- Insurer:** 04513 ALPHA INSURANCE OF FLORIDA
- Insured:** JUSTIN CASE
- Case Type:** NYPIP | JUSTIN CASE
- Claim #:** 132023A
- Filer:** CINDY CALHOUN FILER
- Status:** Deferred - Submitted

Case Deferred: Add/Edit Feature

From the Case Overview page, select **Add/Edit a Feature** from the blue ellipsis found to the left of the Company/Insured information.

Select the blue Ellipsis to see the drop-down menu:

The screenshot displays the 'Case Overview' page for Arbitration Forums, Inc. The page header includes the company logo and name. Below the header, there is a 'Case Overview' section with a dropdown arrow. The main content area is divided into two columns. The left column contains a sidebar with menu items: Summary, Incident Details, Case Qualifiers, Deferment History, Liability, Damages, and Coverage - NYPIP. The right column contains a 'Case Deferred' notification, a 'Case Summary' section with a star icon and the case ID 'I2300006C21-C1', and a 'Company' section. The 'Company' section lists '04513 ALPHA INSURANCE OF FLORIDA' with 'Insured: JUSTIN CASE'. A blue arrow points to a blue ellipsis icon next to the company name, which has opened a drop-down menu. The menu items are 'Add/Edit a Feature' (highlighted in yellow), 'Assign Case', 'Create Case Support Inquiry', and 'Occurrence Overview'. The 'Add/Edit a Feature' option is the one to be selected.

Add Features

This functionality allows you to add features when a case is in deferred status.

Deferred Case: Add Feature

To **add** a new Feature(s) to a deferred case, complete the **Workflow Steps** outlined below:

WORKFLOW STEPS

- Select Coverages
- Add Additional Parties
- Liability Arguments
- Coverage Information - NYPIP
- Feature Information - MARY CASE
- Select Features To Submit
- Filing Options & Billing
- Review & Submit

Workflow Steps may vary based on the Coverage Group:

- Collision, Comprehensive/OTC
- PIP
- Med Pay
- New York PIP

Deferred Case: Add Feature

Select Coverages

WORKFLOW STEPS

- Select Coverages
- Add Additional Parties
- Liability Arguments
- Select Features To Submit
- Filing Options & Billing
- Review & Submit

Choose the **+Select** tab to add a coverage.

Coverages ? **NY PIP Cases**

Select Coverages ? Selected Coverages

Auto Policy	+ Select ?
NYPIP ?	

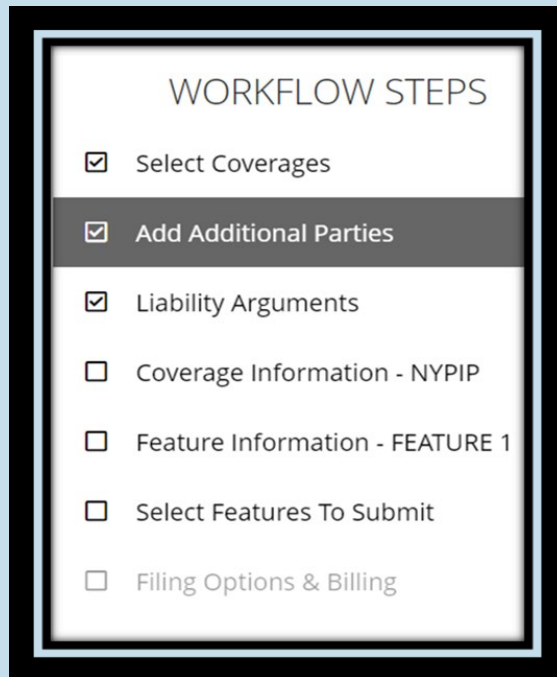
Coverages ? **Collision/OTC Cases**

Select Coverages ? Selected Coverages

Auto Policy	+ Select ?
Collision ?	
Comprehensive/Other than Collision (OTC) ?	

Deferred Case: Add Feature

Add Additional Parties



Add additional **Case Parties** if needed by entering the company name or code in the field provided.

Case Parties

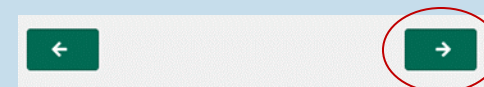
Search Companies

Select Parties

Selected Parties (1)

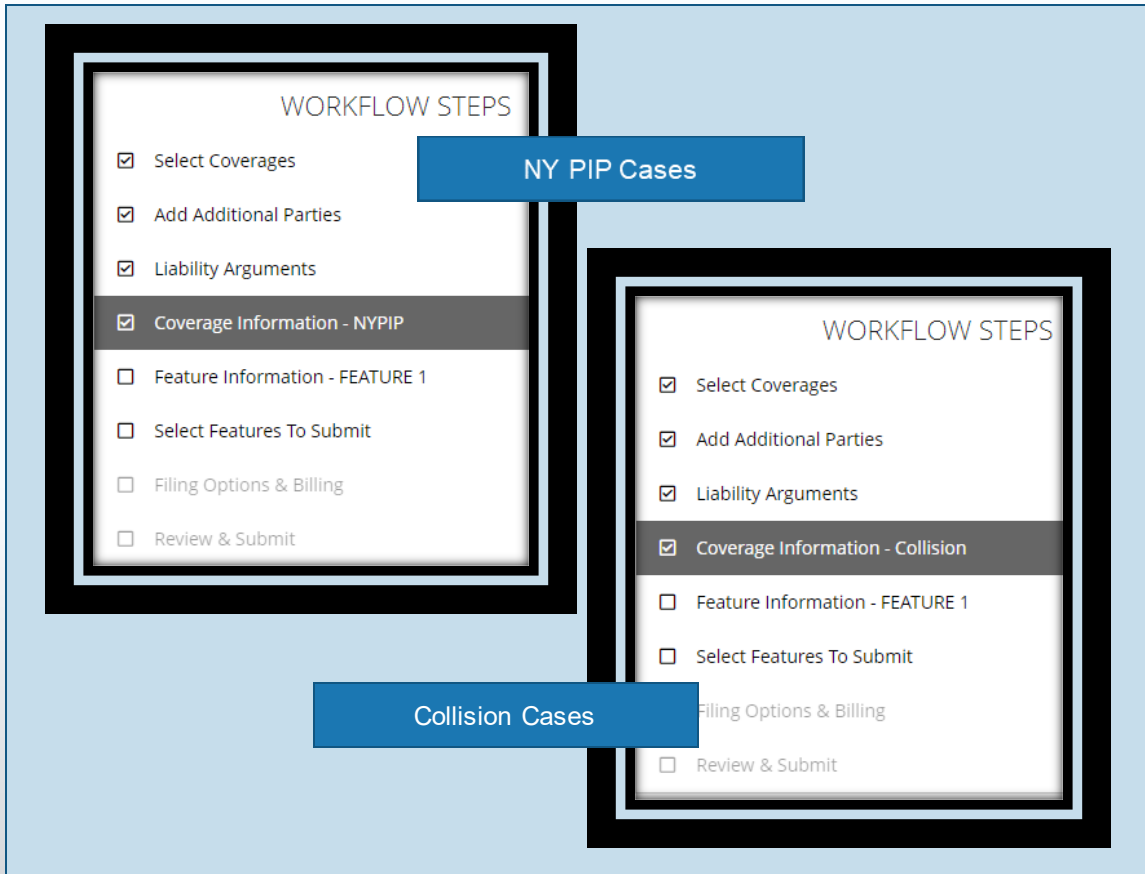
BETA INSURANCE OF COLORADO
Claim Number: 132023B
Insured: NAOMI PRICE

Or simply select the green arrow to navigate to the next step.



Deferred Case: Add Feature

Coverage Information



Workflow Step 1: NY PIP Cases

- Select Coverages
- Add Additional Parties
- Liability Arguments
- Coverage Information - NYPIP**
- Feature Information - FEATURE 1
- Select Features To Submit
- Filing Options & Billing
- Review & Submit

Workflow Step 2: Collision Cases

- Select Coverages
- Add Additional Parties
- Liability Arguments
- Coverage Information - Collision**
- Feature Information - FEATURE 1
- Select Features To Submit
- Filing Options & Billing
- Review & Submit

The **Coverage Information Workflow Step** is pre-filled based on previously entered data.

Coverage - NYPIP ? **NY PIP Cases** + Add a Feature Delete This Coverage

New York PIP Basic Policy Limits apply to all Pedestrians. OBEL limits apply only to Driver and Occupant Injured Party types. If OBEL applies to your Policy, it is recommended that you attach evidence in support of OBEL.

✓ Does Optional Basic Economic Loss (OBEL) apply to this Policy? Yes No

Attached Evidence ? + Attach Evidence

View	Evidence Types (show description)	Detach
	Policy Declarations	

Collision Cases + Add a Feature Delete This Coverage

✓ Does joint and several liability apply to this coverage? ? Yes No

Policy Limits

✓ Will you accept the policy limits as final settlement of your claim? Yes No I'm Not Sure ?

✓ Will you accept the Pro-Rata Share? Yes No

✓ Will you accept the remaining balance? Yes No

✓ Do you agree to reimburse your Insured for out-of-pocket expenses (excluding your Insured deductible that is included in this filing) relating to the Coverage sought? Yes No

Deferred Case: Add Feature

Feature Information

WORKFLOW STEPS

- Select Coverages
- Add Additional Parties
- Liability Arguments
- Coverage Information - NYPIP
- Feature Information**
- Select Features To Submit
- Filing Options & Billing
- Review & Submit

Feature Information requires the injured party (NY PIP) or Vehicle (Collision/OTC) information.

<input checked="" type="checkbox"/> Injured Party First Name	MARY	<input checked="" type="checkbox"/> Vehicle Year	2021
<input checked="" type="checkbox"/> Injured Party Last Name	CASE	<input checked="" type="checkbox"/> Vehicle Make/Model	HONDA ACCORD
Injured Party Suffix		Vehicle Color	Color
<input checked="" type="checkbox"/> Injured Party Status	Occupant		

This step also provides fields where Company-Paid Damages (if known) can be entered.

Please note: Damage amounts are not required until the deferment ends. You will have the opportunity to add them once the deferment ends.

Deferred Case: Add Feature

Select Features to Submit

WORKFLOW STEPS

- Select Coverages
- Add Additional Parties
- Liability Arguments
- Coverage Information - NYPIP
- Feature Information - MARY CASE
- Select Features To Submit**
- Filing Options & Billing
- Review & Submit

Select Features to Submit and request a revisit for responses that raise Jurisdictional Exclusions or Damage Disputes.

Feature Selection ? **NY PIP Cases**

Select the Features to include in this submission.

NYPIP

- Include In Filing
- I need to revisit responses that raise Jurisdictional Exclusions
- I need to revisit responses that raise Damage Disputes

MARY CASE

- I need to revisit responses that raise Jurisdictional Exclusions
- I need to revisit responses that raise Damage Disputes

Feature Selection ? **Collision Cases**

Select the Features to include in this submission.

Collision

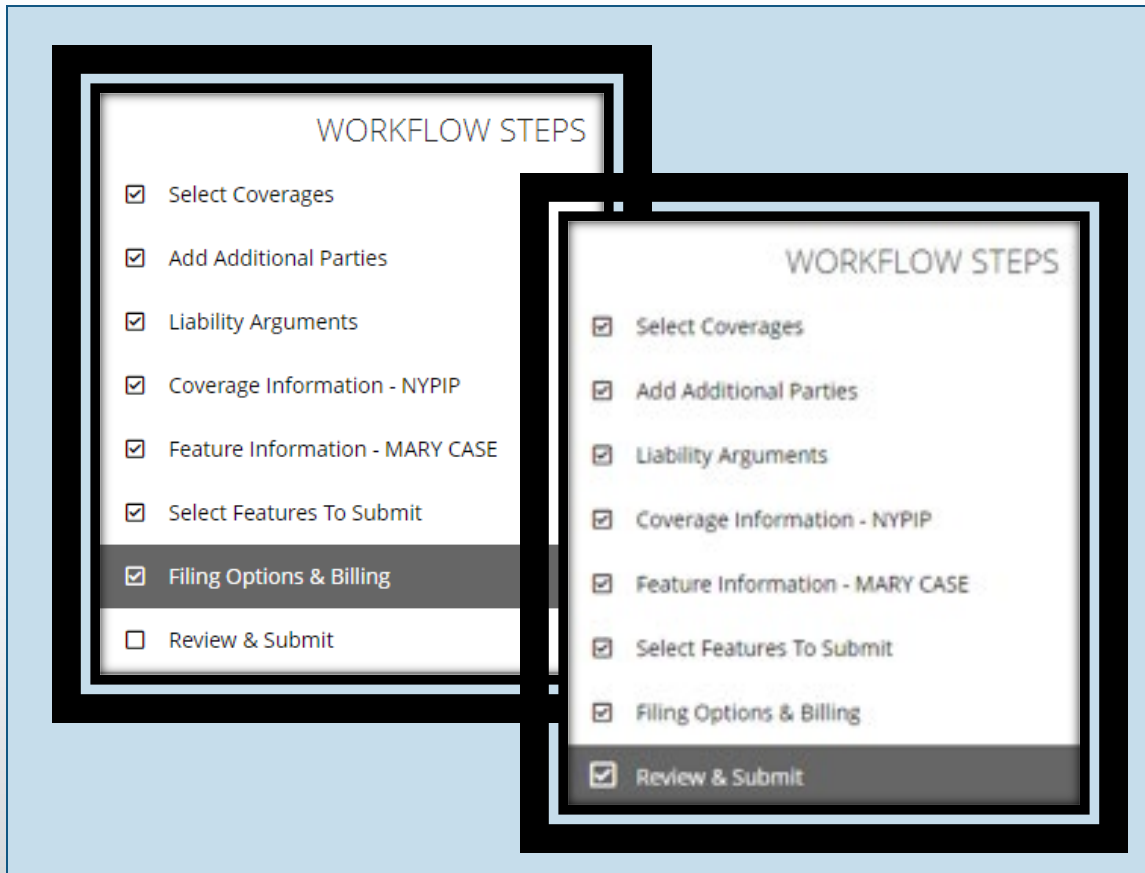
- I need to revisit responses that raise Policy Limits for this coverage [Collision]
- Include In Filing
- I need to revisit responses that raise Jurisdictional Exclusions
- I need to revisit responses that raise Damage Disputes

2021 HONDA

- I need to revisit responses that raise Jurisdictional Exclusions
- I need to revisit responses that raise Damage Disputes

Deferred Case: Add Feature

Filing Options & Billing, Review & Submit



WORKFLOW STEPS

- Select Coverages
- Add Additional Parties
- Liability Arguments
- Coverage Information - NYPIP
- Feature Information - MARY CASE
- Select Features To Submit
- Filing Options & Billing**
- Review & Submit

WORKFLOW STEPS

- Select Coverages
- Add Additional Parties
- Liability Arguments
- Coverage Information - NYPIP
- Feature Information - MARY CASE
- Select Features To Submit
- Filing Options & Billing
- Review & Submit**

Complete the **Filing Options & Billing** Workflow Step.

Filing Options & Billing

Filing Options

Panel of Three

I would like to request a Panel of Three hearing for the following qualified features

MARY CASE

Personal Rep

The representative may only clarify, at the arbitrator's request, its arguments and submitted evidence.

Personal Rep at Hearing? Yes No

Billing

Billing Code to be Invoiced 004513 - ALPHA INSURANCE CO

Review & Submit the Feature(s).

Parties on this Case

ALPHA INSURANCE OF FLORIDA Insured: JUSTIN CASE Claim Number: 132023A Line of Insurance: Personal/Individual	BETA INSURANCE OF COLORADO Insured: NAOMI PRICE Claim Number: 132023B Line of Insurance: Personal/Individual
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ALPHA INSURANCE OF FLORIDA (JUSTIN CASE) Liability

My Arguments

Primary/Excess

Are you alleging primary/excess? No

ALPHA INSURANCE OF FLORIDA (JUSTIN CASE) Recovery

Coverage - NYPIP

Optional Basic Economic Loss (OBEL): Yes

Attached Evidence

Submit

Edit Features

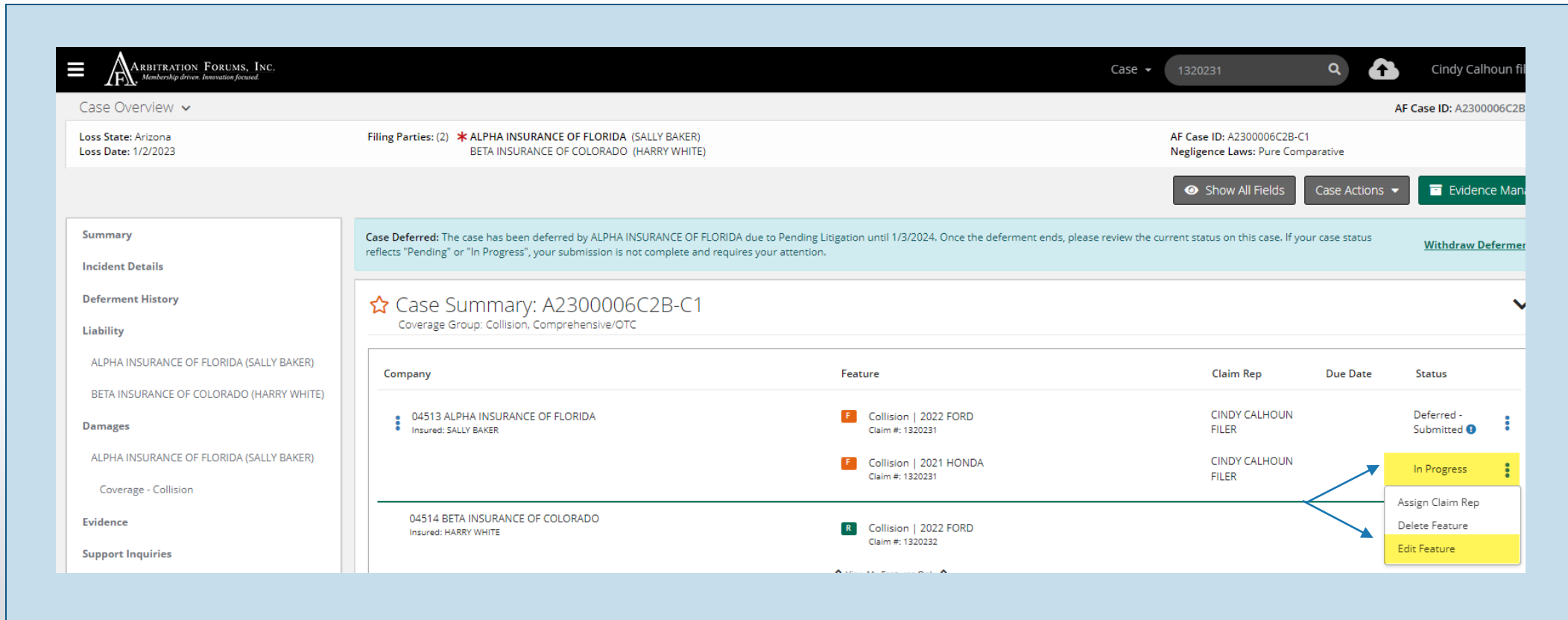
This functionality allows you to edit feature information including vehicle or injured party name, driver/party status, and company-paid damages.



Deferred Case: Edit Feature

To edit a Feature(s), it must display a status of **In-Progress**.

Use the drop-down menu and select **Edit Feature**.



The screenshot shows the 'Case Overview' page for a deferred case. The top navigation bar includes the company logo, a search bar with 'Case 1320231', and the user name 'Cindy Calhoun fil'. Below the navigation, the case details are displayed, including 'Loss State: Arizona', 'Loss Date: 1/2/2023', and 'Filing Parties: (2) * ALPHA INSURANCE OF FLORIDA (SALLY BAKER) BETA INSURANCE OF COLORADO (HARRY WHITE)'. The 'Case Defered' message states: 'The case has been deferred by ALPHA INSURANCE OF FLORIDA due to Pending Litigation until 1/3/2024. Once the deferment ends, please review the current status on this case. If your case status reflects "Pending" or "In Progress", your submission is not complete and requires your attention.' The 'Case Summary' section shows 'Case Summary: A2300006C2B-C1' with 'Coverage Group: Collision, Comprehensive/OTC'. A table lists the features:

Company	Feature	Claim Rep	Due Date	Status
04513 ALPHA INSURANCE OF FLORIDA Insured: SALLY BAKER	Collision 2022 FORD Claim #: 1320231	CINDY CALHOUN FILER		Deferred - Submitted
	Collision 2021 HONDA Claim #: 1320231	CINDY CALHOUN FILER		In Progress
04514 BETA INSURANCE OF COLORADO Insured: HARRY WHITE	Collision 2022 FORD Claim #: 1320232			

A dropdown menu is open for the 'In Progress' status of the second feature, showing options: 'Assign Claim Rep', 'Delete Feature', and 'Edit Feature'. Blue arrows point from the 'Edit Feature' option to the 'In Progress' status cell in the table.

Deferred Case: Edit Feature

Feature Information (Collision, Comprehensive/OTC)

WORKFLOW STEPS

- Select Coverages
- Add Additional Parties
- Liability Arguments
- Coverage Information - Collision
- Feature Information - 2021 HONDA
- Select Features To Submit
- Filing Options & Billing
- Review & Submit

From the **Feature Information** Workflow Step, edit vehicle year, make, and model. Driver information can also be edited from this step.

Feature - 2021 HONDA ?

Vehicle Year ?

Vehicle Make/Model

Vehicle Color

Who was the driver? Same as Insured Other No Driver Specified

Driver's First Name

Driver's Last Name

Deferred Case: Edit Feature

Feature Information (PIP, Med Pay, and New York PIP)

WORKFLOW STEPS

- Select Coverages
- Add Additional Parties
- Liability Arguments
- Coverage Information - NYPIP
- Feature Information - REBECCA CASE
- Select Features To Submit
- Filing Options & Billing
- Review & Submit

From the **Feature Information** Workflow Step, edit the injured party first and last name. The injured party status can also be edited from this step to include driver, passenger, or occupant.

Feature - REBECCA CASE ?

Injured Party First Name

Injured Party Last Name

Injured Party Suffix

Injured Party Status

Driver

Occupant

Pedestrian

Deferred Case: Edit Feature

Feature Information

WORKFLOW STEPS

- Select Coverages
- Add Additional Parties
- Liability Arguments
- Coverage Information
- Feature Information
- Select Features To Submit
- Filing Options & Billing
- Review & Submit

From this step you can also add/edit **Company-Paid Damages**, if known.

Company-Paid Damages NY PIP Cases

Medical Expenses	<input type="text"/>
Lost Wages	<input type="text"/>
Replacement Benefits and Services <small>?</small>	<input type="text"/>
Death Benefit	<input type="text"/>
Allocated Expenses <small>?</small>	<input type="text"/>

Company-Paid Damages

Total Loss Yes No

Auto Damage ?

Rental

Loss of Use

Towing

Collision Cases



Deferred Case: Edit Feature

Complete all remaining Workflow Steps and Submit feature. Once submitted, only the Company-Paid Damages can be edited. See [Edit Damages](#).

WORKFLOW STEPS

- Select Coverages
- Add Additional Parties
- Liability Arguments
- Coverage Information
- Feature Information
- Select Features To Submit
- Filing Options & Billing
- Review & Submit

Feature Selection ?

Select the Features to include in this submission.

I need to revisit responses that raise Policy Limits for this coverage [Collision]

Include In Filing

I need to revisit responses that raise Jurisdictional Exclusions
 I need to revisit responses that raise Damage Disputes

Total Damages Sought: \$0.00

Filing Options & Billing

Panel of Three ?

No features qualify to request a Panel of Three

Personal Rep

The representative may only clarify, at the arbitrator's request, its arguments and submitted evidence.

Personal Rep at Hearing? Yes No

Review & Submit ?

ALPHA INSURANCE OF FLORIDA

Insured: SALLY BAKER

Claim Number: 1320231

Line of Insurance: Personal/Individual

BETA INSURANCE OF COLORADO

Insured: HARRY WHITE

Claim Number: 1320232

Line of Insurance: Personal/Individual

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Delete Features

This functionality allows you to delete features when a case is in deferred status.

Deferred Case: Delete Feature

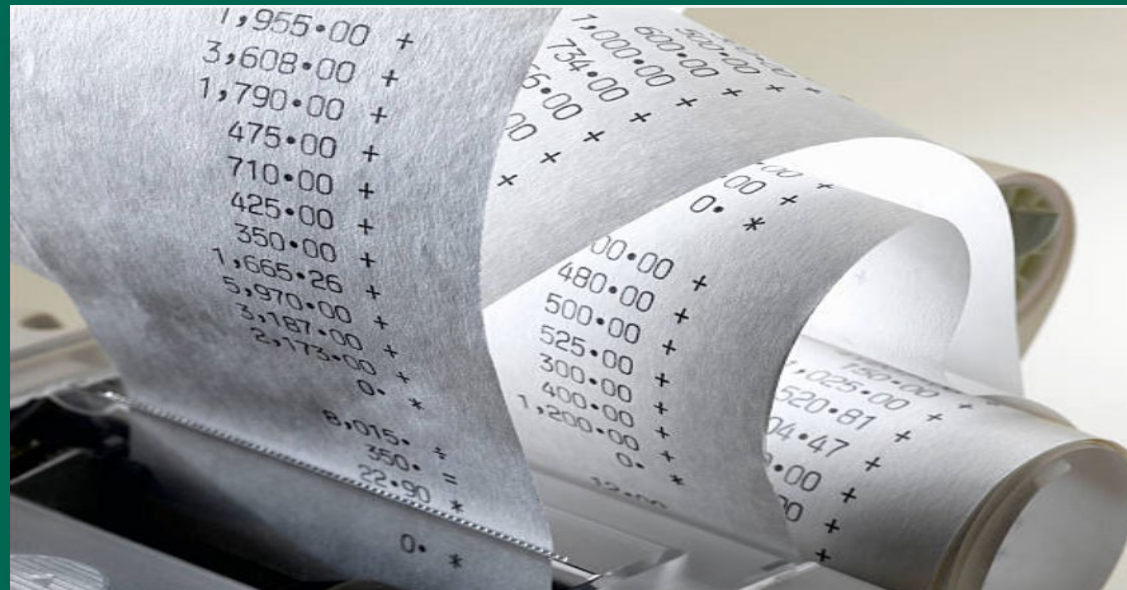


To delete a feature, select **Delete Feature** from the drop-down menu.

Feature	Claim Rep	Due Date	Status
Collision 2022 FORD Claim #: 1320231	CINDY CALHOUN FILER		Deferred - Submitted
Collision 2021 HONDA Claim #: 1320231	CINDY CALHOUN FILER		In Progress

View Features From All Parties

- Assign Claim Rep
- Delete Feature**
- Edit Feature



Edit Damages

Edit damages when a case is in deferred status. This includes supplements paid during this time.



Deferred Case: Edit Damages



From the blue ellipsis, select **Edit Damages** from the drop-down menu.

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

- Case ID:** A2300006C2B-C1 (marked with a star icon)
- Loss State:** Arizona
- Loss Date:** 1/2/2023
- Insurer:** 04513 ALPHA INSURANCE OF FLORIDA
- Insured:** SALLY BAKER
- Claim 1:** Collision | 2022 FORD, Claim #: 1320231
- Claim 2:** Collision | 2021 HONDA, Claim #: 1320231
- Status:** Deferred - Submitted (with a blue ellipsis menu icon)
- Dropdown Menu:** Opened over the status, showing options: Assign Claim Rep, Edit Damages (highlighted in yellow), and Withdraw Feature.
- Footer:** View Features From All Parties (with expand/collapse icons)

Deferred Case: Edit Damages

A pop-up window with Feature information is displayed. Editable fields are present depending on the Coverage Group selected.

Collision Cases

Edit Damages - 2021 HONDA - Submitted

✓ Vehicle Year ⓘ	2021
✓ Vehicle Make/Model	HONDA ACCORD
Vehicle Color	
✓ Who was the driver?	Same as Insured
Driver's First Name	SALLY
Driver's Last Name	BAKER
★ Does bailment apply? ⓘ	<input type="radio"/> Yes <input checked="" type="radio"/> No
★ Does spoliation of evidence apply? ⓘ	<input type="radio"/> Yes <input checked="" type="radio"/> No

Editable fields

Scrolling down the page displays editable fields for **Company-Paid Damages**.

Company-Paid Damages

Total Loss Yes No

Auto Damage ⓘ

Rental

Loss of Use

Towing

Storage

Personal Property

Diminished Value ⓘ

Edit damages previously entered.

Or enter new amounts made during the deferment process. This includes supplements.

Deferred Case: Edit Damages

After entering or editing feature damages, attach additional supporting evidence and select the **Save** tab.

Edit Damages - 2021 HONDA - Submitted

Damages Justification/Dispute Rebuttal ?

Characters remaining: 12000

Total Prior Payments Received Add Prior Payment Received ▾

No Prior Payments Recorded

Attached Evidence ? + Attach Evidence

Evidence items have not been attached.

Save

Member Support

For questions on how to withdraw a deferment or other TRS workflows, please contact Member Services at 866-977-3434.



Additional Resources

[Click here to learn how to request a deferment.](#)

[Click here to learn how to withdraw a deferment.](#)

[Click here to learn how to challenge a deferment.](#)

