

E-Subro Hub Mass Reassign Reference Guide

January 2023



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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			
1 2 FROM User/Business Unit Work to Transfer	3 TO User/Business Unit Complete transfer		
Find User/Business Unit to transfer FROM			
Choose User Lhoose 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	
	Searc	n Reset	

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

Fin	d User/I	Business Ui	nit to tra	ansfer FROM	1							
CI	noose User	Choose Unit	Status									
						Search	Again					
						11 users found. Sele	ct a user to proce	ed.				
	User ID 🌲			First Name 🖨	Last Name 🗘	Email 🗘		Mailing Address 🗢	City 🗢	State 🗢	Zip 🗘	
	jdemander	101		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.0	04513		LYN	DEMANDER	test@arbfile.org		3820 Northdale Blvd	Tampa	FL	33624	
	sdemanade	er.04513		SALLY	DEMANDER	sdemander@alpha.com						
	xdemander	r.alpha		XENA	DEMANDER	msinha@arbfile.org		3350 Buschwood Park Dr	Tampa	FL	33618	
	zdemander	r.04513		ZACHARY	DEMANDER	bkollasch@arbfile.org		350 5th Ave	New York	NY	10118	
	- de ance de a	1.04510		71510	DEMANDED	and the still of solution		aaro our dun din din di	*	<i></i>	22010	
L	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		
hoose 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.

Image: Section of the section of th	Mass Reassign						
Find User/Business Unit to transfer FROM Choose User Choose Use C	1 FROM User/Business Unit	2 Work to Transfer	3 TO User/Business Unit	4 Complete transfer			
Reassignment Status Date initiated Initiated by User Completed Status Date initiated Initiated By User To User/Business Unit Status 12/16/20211243 JOHN DEMANDER ZANE DEMANDER ZACHARY DEMANDER Completed 12/16/20211237 JOHN DEMANDER Clerical ZACHARY DEMANDER Error 12/16/20211247 JACKI DEMANDER1 JOHN DEMANDER Completed Completed 12/16/20211231 JOHN DEMANDER Clerical ZACHARY DEMANDER Completed 12/16/20211247 JACKI DEMANDER Subto Team 2 Completed Completed 12/16/2021123 JOHN DEMANDER Subto Team 2 Completed Completed 12/16/2021123 JOHN DEMANDER ZACHARY DEMANDER Completed Completed 12/16/2021123 JOHN DEMANDER ZACHARY DEMANDER Completed Completed 12/16/2021123 JOHN DEMANDER ZACHARY DEMANDER Completed Completed 12/16/2021124 JOHN DEMANDER ZACHARY DEMANDER Completed Completed 12/16/2021124	Find User/Business Ur	nit to transfer FROM					
Date initiated Initiated By User From User/Business Unit To User/Business Unit Status 12/16/2022 1243 JOHN DEMANDER ZANE DEMANDER ZACHARY DEMANDER Completed 12/16/2022 1228 JACK1 DEMANDER JOHN DEMANDER COMMERCE DEMANDER Error 12/16/2022 1227 JOHN DEMANDER Clerical ZACHARY DEMANDER Error 12/16/2022 1223 JOHN DEMANDER Clerical ZACHARY DEMANDER Error 12/16/2022 12:3 JOHN DEMANDER Subor Team 1 Subor Team 2 Completed 12/16/2022 12:3 JOHN DEMANDER ZACHARY DEMANDER Completed ZACHARY DEMANDER Completed 12/16/2022 12:3 JOHN DEMANDER ZACHARY DEMANDER ZAMERE Completed 12/16/2022 12:3 JOHN DEMANDER ZACHARY DEMANDER Completed ZACHARY DEMANDER Completed 12/16/2022 12:3 JOHN DEMANDER ZACHARY DEMANDER Completed ZACHARY DEMANDER Completed 12/16/2022 12:03 JOHN DEMANDER ZAMENDER ZACHARY DEMANDER Completed 12/16/2022 12:01	Reassignment Stat	US on the last mass reassignment initia	ated by you and any in progress	mass reassignment for your company.	sh 3		
12/16/2022 14:43 JOHN DEMANDER ZANE DEMANDER ZACHARY DEMANDER Completed 12/16/2022 12:28 JACK DEMANDER JOHN DEMANDER COMMERCE DEMANDER Error 12/16/2022 12:27 JOHN DEMANDER Clerical ZACHARY DEMANDER Completed 12/16/2022 11:17 JACK DEMANDER JOHN DEMANDER COMMERCE DEMANDER Error 12/16/2022 11:17 JACK DEMANDER JOHN DEMANDER COMMERCE DEMANDER Error 12/16/2022 11:23 JOHN DEMANDER Subro Team 1 Subro Team 2 Completed 12/16/2022 11:3 JOHN DEMANDER ZACHARY DEMANDER ZACHARY DEMANDER Completed 12/16/2022 11:1 JACK DEMANDER ZAHE DEMANDER ZACHARY DEMANDER Completed 12/16/2022 11:1 JACK DEMANDER ZAHE DEMANDER Completed 12/16/2022 11:1 JACK DEMANDER JOHN DEMANDER Completed	Date initiated	Initiated By	User	From User/Business Unit	To User/Business Unit	Status	
12/16/2022 09:58 JACKL DEMANDER1 JOHN DEMANDER JM DEMANDER Completed 12/16/2022 06:52 JACKL DEMANDER1 ELLEN MOSER JOHN DEMANDER Completed	12/16/2022 14:43 12/16/2022 12:28 12/16/2022 12:27 12/16/2022 11:17 12/16/2022 12:23 12/16/2022 12:23 12/16/2022 12:20 12/16/2022 11:11 12/16/2022 01:58 12/16/2022 06:52	JACKT DEW JACKT DEW JOHN DEW JOHN DEW JOHN DEW JOHN DEW JOHN DEW	ANDER ANDER ANDER ANDER ANDER ANDER ANDER ANDER ANDERI ANDERI ANDERI	ZANE DEMANDER JOHN DEMANDER Cleical JOHN DEMANDER Subo Team 1 ZACHARY DEMANDER ZANE DEMANDER JOHN DEMANDER JOHN DEMANDER BLEN MOSER	ZACHARY DEMANDER COMMERCE DEMANDER ZACHARY DEMANDER SUNT TEAT ZANE DEMANDER ZANE DEMANDER ZACHARY DEMANDER JIM DEMANDER JOHN DEMANDER JOHN DEMANDER	Completed Error Completed Error Completed Completed 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	Work to	2 Transfer		TO Us	3 er/Business U	nit	4 Complete transfer					
Demand Listing	< 0	Cancel	Cont	inue >			Demand Li	isting		4 Demand(s) selected	Select all 18 demands Clear All	Full 👻
JACK1 DEMANDER1		My Role	6	Sort By:		•	Claim # ≑	Date Issued ≑ Status ≑	Opposing Party ≑ Admin ≑	Original Amt 🗢	Offer (D) Offer (R) Last Action Last Action Days	Owner ≑ ⇒ Days Issued ≑
Selected Filters		D		9.8		a 4	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		D			1 🗆 4		AC202205261150-D	05/26/2022 In Negotiation	BETA INSURANCE OF COLORADO	\$3,562.00	\$3,042.00 Rejected Paymer \$3,042.00 173 day(s)	it JACK1 DEMANDER1 209 day(s)
Demand Status		D) III 4	1	kw-050420220238	05/04/2022 Accepted	BETA INSURANCE OF COLORADO	\$3,500.00	\$3,500.00 Accepted (R) \$3,500.00 231 day(s)	JACK1 DEMANDER1 231 day(s)
Outstanding 👻 🧵		D			1 🗉 4	1	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	0					••	33-20210021-0854-D	09/21/2021	BETA INSURANCE OF	\$2,500,00	\$3,500,00, Jesued	IACKI DEMANDERI

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/Business Unit	4 Complete transfer	
Select Demands				
Choose work items to be f 28 of 216 Demands seler 0 Add Evidence Task 0 Appraiser Damage Tas	cransferred FROM Sub	rogation ^{m List}		
			< 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 item: 28 Demand(s)	s from Subrogation a	are selected for reassignm	ient.				
Find User/Business Un Choose User Choose Unit	it to transfer TO						
			Search A 1 user found. Select th	gain e user to proceed.			
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.

Mass Reassign	
1 2 3 4 FROM User/Business Unit Work to Transfer To User/Business Unit Complete transfer	
The following work items from ROBIN ADJUSTER-04513 are selected for reassignment. 1 Demand(s)	
Find User/Business Unit to transfer TO Choose Us Choose Unit	
Business Unit Filter	
Filter by Business Unit Name	
Showing 5 of 32 Business Units. 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 Reass	sign					
1 FROM User/Busin	ess Unit Work to Transfer	3 TO User/Business Unit	4 Complete transfer			
Review Trans	sfer					
Transfer selec	ted work items					
FROM	Subrogation					
то	ROBIN ADJUSTER-04513					
28 Demand(s)					
			< Cancel Co	ifirm >		

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.

