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E-Subro Hub My Team Reference Guide

January 2023

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My Team Access

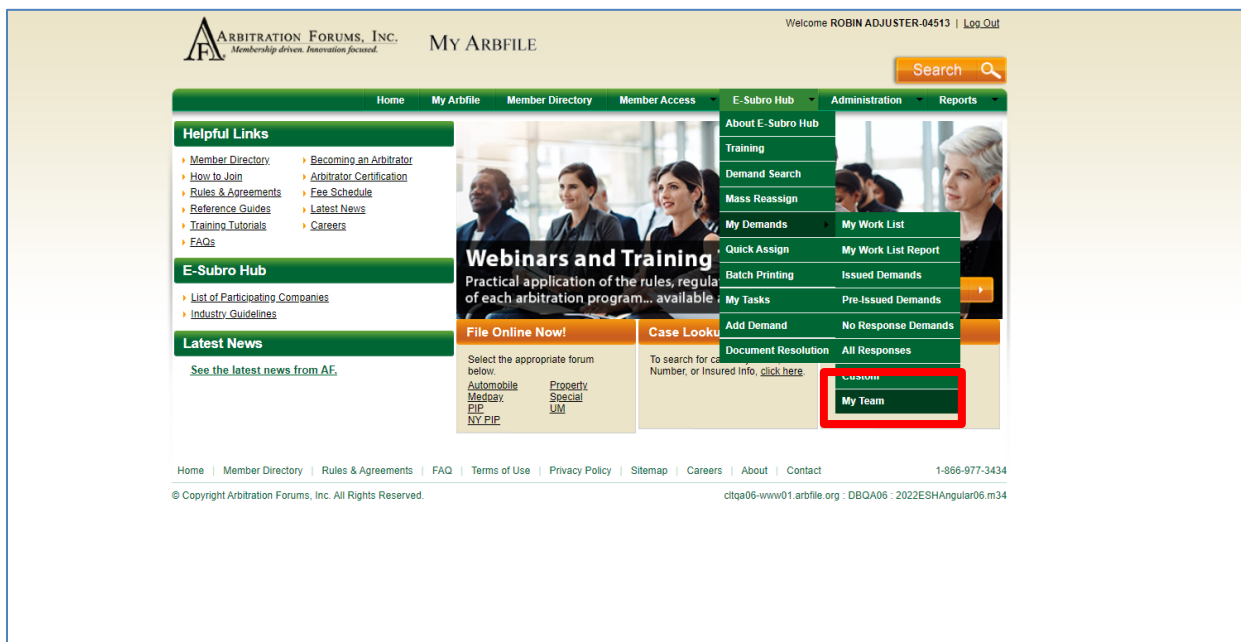
The ability to see the “My Team” menu option requires a company-wide configuration setting and is available to all users if active for the company.

However, it is most useful for an individual who will manage a group of associates.

My Arbfile Page

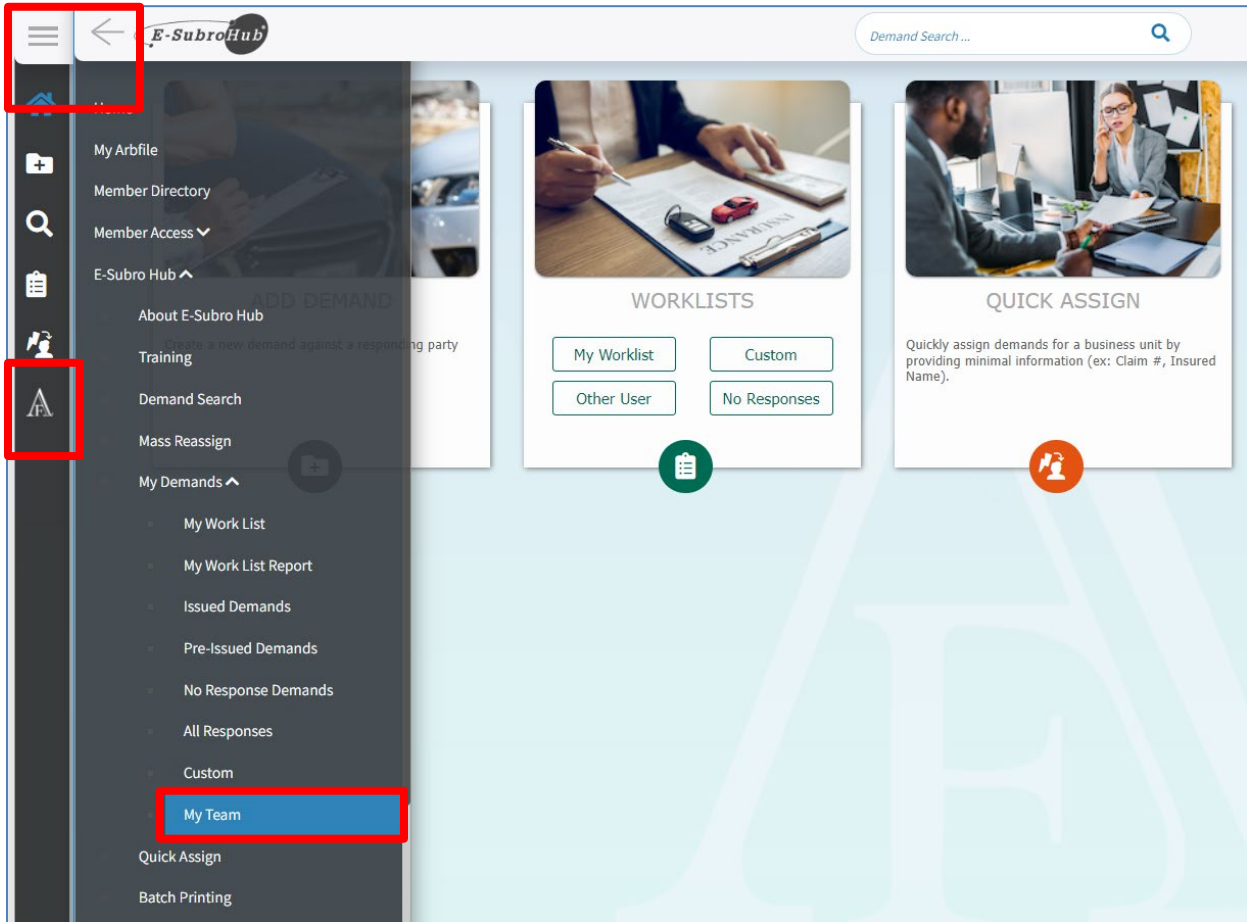
From the “My Arbfile” page, click the E-Subro Hub drop-down menu, then “My Demands” followed by “My Team.”

While this is the most common path to start a My Team session, there are other locations on the E-Subro Hub platform to access My Team.



Menu Links

E-Subro Hub contains menus with a “My Team” link. The AF logo on the side menu and the “hamburger” menu at the top-left corner will open a menu tree with a “My Team” option.



Team Demand Listing Page

The “Team Demand Listing” page will show the demands for an established team with the pre-set filters of Demand Status (Outstanding), Action Flag (Yes), and Issue Date (30 Days – 6 months) active.

My Team Filters

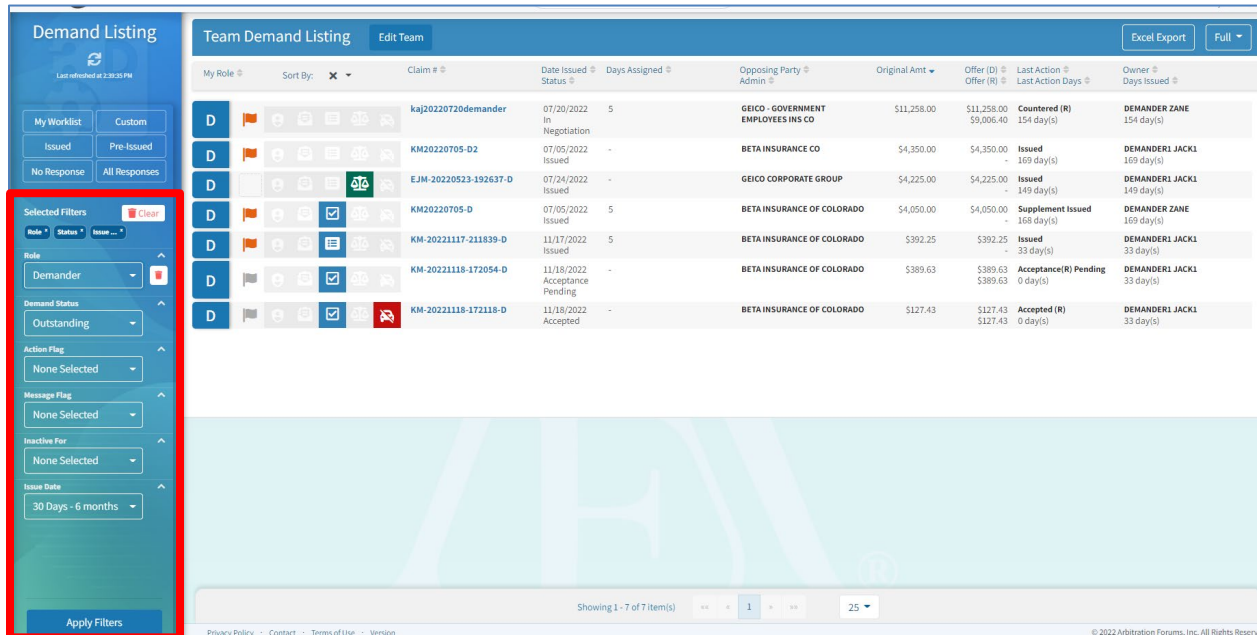
The options on the “My Team Filters” page are similar to the six filters found under the Custom Search.

- **Role** – The role can be set to Demander, Responder, or None Selected for Both.
- **Demand Status** – There is a required selection of Pre-Issued, Closed, Outstanding, or a specific status of an open demand.
- **Action Flag** – Yes, No, or None Selected
- **Message Flag** – Yes, No, or None Selected
- **Inactive For** – Set a date range or None Selected
- **Issued Date** – The default selection is 30 days – 6 months, but there are other options available.

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.



The screenshot shows the "Team Demand Listing" interface. On the left, a sidebar contains "Selected Filters" with a "Clear" button and seven filter categories: Role (Demander), Demand Status (Outstanding), Action Flag (None Selected), Message Flag (None Selected), Inactive For (None Selected), and Issue Date (30 Days - 6 months). The main table displays demand details with columns: My Role, Sort By, Claim #, Date Issued Status, Days Assigned, Opposing Party Admin, Original Amt, Offer (D) Offer (R), Last Action Last Action Days, and Owner Days Issued. The table lists seven items, including demands from GEICO and BETA INSURANCE OF COLORADO.

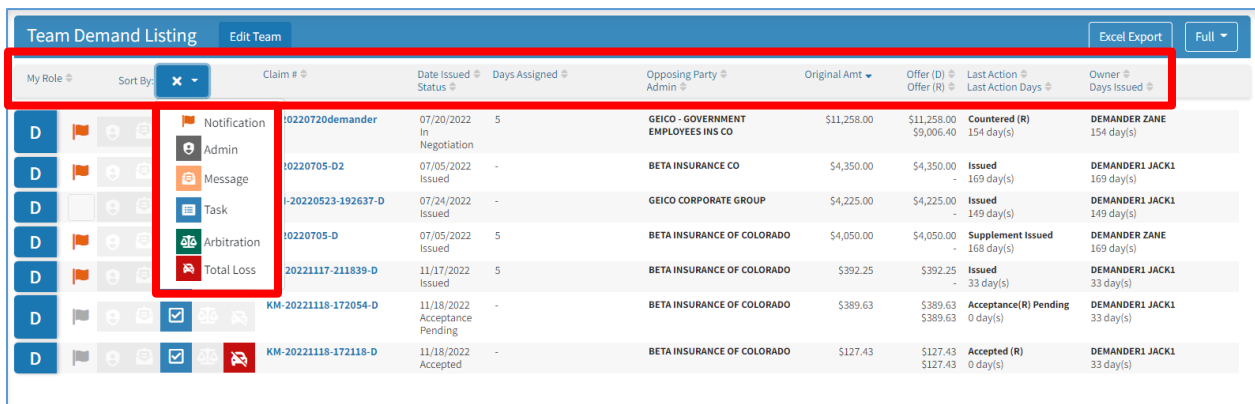
My Role	Sort By	Claim #	Date Issued Status	Days Assigned	Opposing Party Admin	Original Amt	Offer (D) Offer (R)	Last Action Last Action Days	Owner Days Issued
D		kaJ20220720demander	07/20/2022 In Negotiation	5	GEICO - GOVERNMENT EMPLOYEES INS CO	\$11,258.00	\$11,258.00 \$9,006.40	Countered (R) 154 day(s)	DEMANDER ZANE 154 day(s)
D		KM20220705-02	07/05/2022 Issued	-	BETA INSURANCE CO	\$4,350.00	\$4,350.00	Issued 169 day(s)	DEMANDER JACK1 169 day(s)
D		EJN-20220523-192637-D	07/24/2022 Issued	-	GEICO CORPORATE GROUP	\$4,225.00	\$4,225.00	Issued 149 day(s)	DEMANDER JACK1 149 day(s)
D		KM20220705-D	07/05/2022 Issued	5	BETA INSURANCE OF COLORADO	\$4,050.00	\$4,050.00	Supplement Issued 168 day(s)	DEMANDER ZANE 168 day(s)
D		KM-20221117-211839-D	11/17/2022 Issued	5	BETA INSURANCE OF COLORADO	\$392.25	\$392.25	Issued 33 day(s)	DEMANDER JACK1 33 day(s)
D		KM-20221118-172054-D	11/18/2022 Acceptance Pending	-	BETA INSURANCE OF COLORADO	\$389.63	\$389.63	Acceptance(R) Pending 0 day(s)	DEMANDER JACK1 33 day(s)
D		KM-20221118-172118-D	11/18/2022 Accepted	-	BETA INSURANCE OF COLORADO	\$127.43	\$127.43	Accepted (R) 0 day(s)	DEMANDER JACK1 33 day(s)

My Team Columns

The columns listed on the “My Team Columns” page are the same as those seen on the Worklist or Custom Search. However, there is an additional column noting the number of days assigned to the owning associate.

- **My Role** – Demander, Responder, or Both
- **Action Flag** – A pending negotiation action or expired diary
- **Admin** – The demand is currently assigned to an outside administrator

- **Messages** – A pending message needs review.
- **Task** – A pending task is awaiting review and completion.
- **Arbitration** – A related arbitration has been filed on the demand.
- **Total Loss** – The vehicle involved in the loss has been deemed a total loss.
- **Claim Number** – The claim number entered for the user’s internal file and the active link to open the demand
- **Date Issued** – The date the demand is issued and the default sorting option (oldest to newest)
- **Status** – Lists the current negotiation status of the demand (Issued, Pending, Accepted, Denied, etc.)
- **Days Assigned** – The number of days the demand has been assigned to the current owner
- **Opposing Party** – The other party involved in the claim
- **Admin** – This would list the name of the outside administrator company
- **Original Amount** – The original demand amount when issued
- **Offer (D)** – Current negotiation position of the Demander
- **Offer (R)** – Current negotiation position of the Responder
- **Last Action** – Lists the last action taken by the Demander or Responder
- **Last Action Days** – Lists the number of days from the last action
- **Owner** – Lists the current owner of the demand (individual or business unit)
- **Days Issued** – Lists the number of days from when the demand was issued

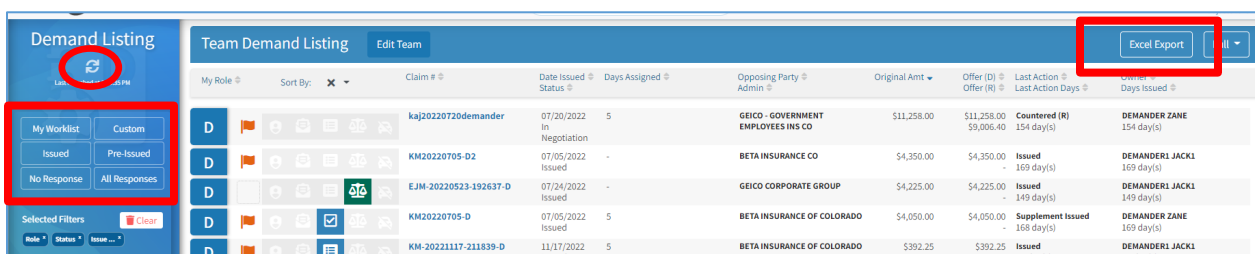


My Role	Sort By	Claim #	Date Issued / Status	Days Assigned	Opposing Party	Original Amt	Offer (D) / Offer (R)	Last Action / Last Action Days	Owner / Days Issued
D		0220720demander	07/20/2022 In Negotiation	5	GEICO - GOVERNMENT EMPLOYEES INS CO	\$11,258.00	\$11,258.00 / \$9,006.40	Countered (R) / 154 day(s)	DEMANDER1 ZANE / 154 day(s)
D		0220705-D2	07/05/2022 Issued	-	BETA INSURANCE CO	\$4,350.00	\$4,350.00	Issued / 169 day(s)	DEMANDER1 JACK1 / 169 day(s)
D		20220523-192637-D	07/24/2022 Issued	-	GEICO CORPORATE GROUP	\$4,225.00	\$4,225.00	Issued / 149 day(s)	DEMANDER1 JACK1 / 149 day(s)
D		0220705-D	07/05/2022 Issued	5	BETA INSURANCE OF COLORADO	\$4,050.00	\$4,050.00	Supplement Issued / 168 day(s)	DEMANDER1 ZANE / 169 day(s)
D		20221117-211839-D	11/17/2022 Issued	5	BETA INSURANCE OF COLORADO	\$392.25	\$392.25	Issued / 33 day(s)	DEMANDER1 JACK1 / 33 day(s)
D		KM-20221118-172054-D	11/18/2022 Acceptance Pending	-	BETA INSURANCE OF COLORADO	\$389.63	\$389.63	Acceptance (R) Pending / 0 day(s)	DEMANDER1 JACK1 / 33 day(s)
D		KM-20221118-172118-D	11/18/2022 Accepted	-	BETA INSURANCE OF COLORADO	\$127.43	\$127.43	Accepted (R) / 0 day(s)	DEMANDER1 JACK1 / 33 day(s)

My Team Actions

The “Refresh” button and “Excel Export” are available on the “My Team” page as with other lists.

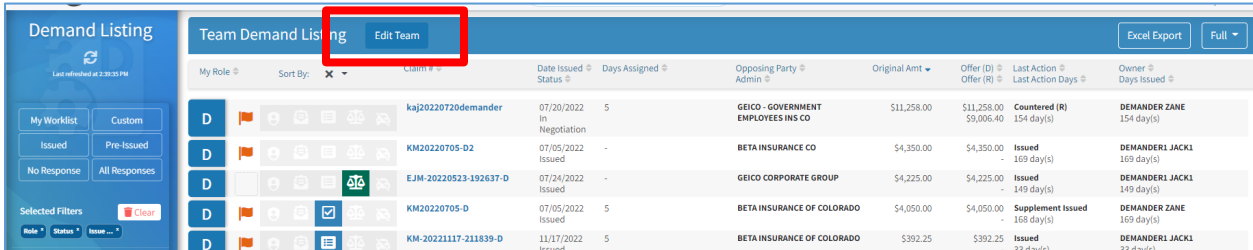
The user can move from the “My Team” page to another list (e.g. My Worklist or Custom) by clicking one of the quick link buttons.



My Role	Sort By	Claim #	Date Issued / Status	Days Assigned	Opposing Party	Original Amt	Offer (D) / Offer (R)	Last Action / Last Action Days	Owner / Days Issued
D		kaj20220720demander	07/20/2022 In Negotiation	5	GEICO - GOVERNMENT EMPLOYEES INS CO	\$11,258.00	\$11,258.00 / \$9,006.40	Countered (R) / 154 day(s)	DEMANDER1 ZANE / 154 day(s)
D		KM20220705-D2	07/05/2022 Issued	-	BETA INSURANCE CO	\$4,350.00	\$4,350.00	Issued / 169 day(s)	DEMANDER1 JACK1 / 169 day(s)
D		EJM-20220523-192637-D	07/24/2022 Issued	-	GEICO CORPORATE GROUP	\$4,225.00	\$4,225.00	Issued / 149 day(s)	DEMANDER1 JACK1 / 149 day(s)
D		KM20220705-D	07/05/2022 Issued	5	BETA INSURANCE OF COLORADO	\$4,050.00	\$4,050.00	Supplement Issued / 168 day(s)	DEMANDER1 ZANE / 169 day(s)
D		KM-20221117-211839-D	11/17/2022 Issued	5	BETA INSURANCE OF COLORADO	\$392.25	\$392.25	Issued / 33 day(s)	DEMANDER1 JACK1 / 33 day(s)

Create or Edit a Team

The “Edit Team” button will allow a user to create a new team or revise an existing team. It is important to note a single login can only have a one team at a time.

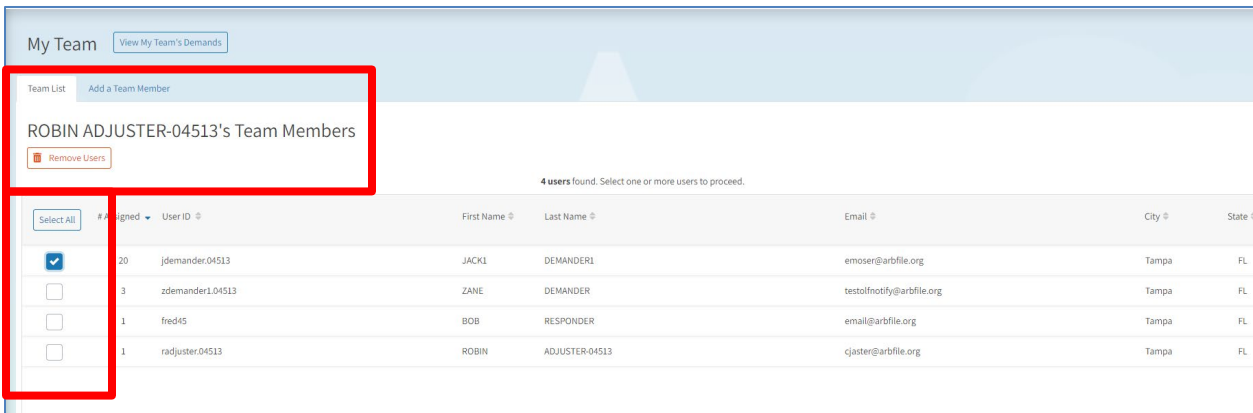


My Role	Sort By	Date Issued Status	Days Assigned	Opposing Party Admin	Original Amt	Offer (D) Offer (R)	Last Action Last Action Days	Owner Days Issued
D		07/20/2022 In Negotiation	5	GEICO - GOVERNMENT EMPLOYEES INS CO	\$11,258.00	\$11,258.00 \$9,006.40	Countered (R) 154 day(s)	DEMANDER ZANE 154 day(s)
D		07/05/2022 Issued	-	BETA INSURANCE CO	\$4,350.00	\$4,350.00 -	Issued 169 day(s)	DEMANDER JACK1 169 day(s)
D		07/24/2022 Issued	-	GEICO CORPORATE GROUP	\$4,225.00	\$4,225.00 -	Issued 149 day(s)	DEMANDER JACK1 149 day(s)
D		07/05/2022 Issued	5	BETA INSURANCE OF COLORADO	\$4,050.00	\$4,050.00 -	Supplement Issued 168 day(s)	DEMANDER ZANE 168 day(s)
D		11/17/2022 Issued	5	BETA INSURANCE OF COLORADO	\$392.25	\$392.25 -	Issued 93 day(s)	DEMANDER JACK1 93 day(s)

Team List Tab

The “Team List” tab will show the current list of associates comprising a team.

A team member(s) can be removed by selecting the associate, then clicking “Remove Users.”



My Team [View My Team's Demands](#)

Team List [Add a Team Member](#)

ROBIN ADJUSTER-04513's Team Members

[Remove Users](#)

4 users found. Select one or more users to proceed.

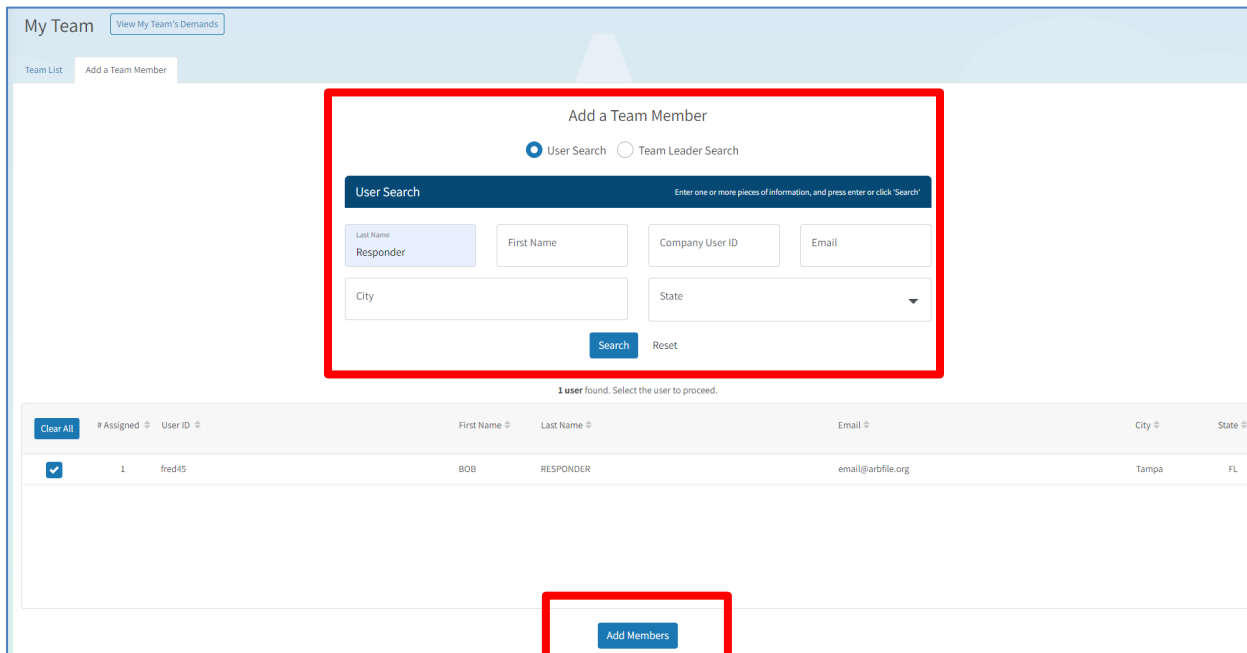
Select All	# Assigned	User ID	First Name	Last Name	Email	City	State
<input checked="" type="checkbox"/>	20	jdemande04513	JACK1	DEMANDER1	emoser@arbfile.org	Tampa	FL
<input type="checkbox"/>	3	zdemande1,04513	ZANE	DEMANDER	testofnotify@arbfile.org	Tampa	FL
<input type="checkbox"/>	1	fred45	BOB	RESPONDER	email@arbfile.org	Tampa	FL
<input type="checkbox"/>	1	radjuster,04513	ROBIN	ADJUSTER-04513	cjaster@arbfile.org	Tampa	FL

Add a Team Member Tab

The “Add a Team Member” tab will allow the user to create a new team or add to an existing team.

User Search

To search for a user, enter one or more pieces of information and press “Enter” or click “Search.” Check a desired result and click “Add Members” to add the user to the team.



My Team [View My Team's Demands](#)

Team List [Add a Team Member](#)

Add a Team Member

User Search Team Leader Search

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

Last Name
Responder

First Name

Company User ID

Email

City

State

Search [Reset](#)

1 user found. Select the user to proceed.

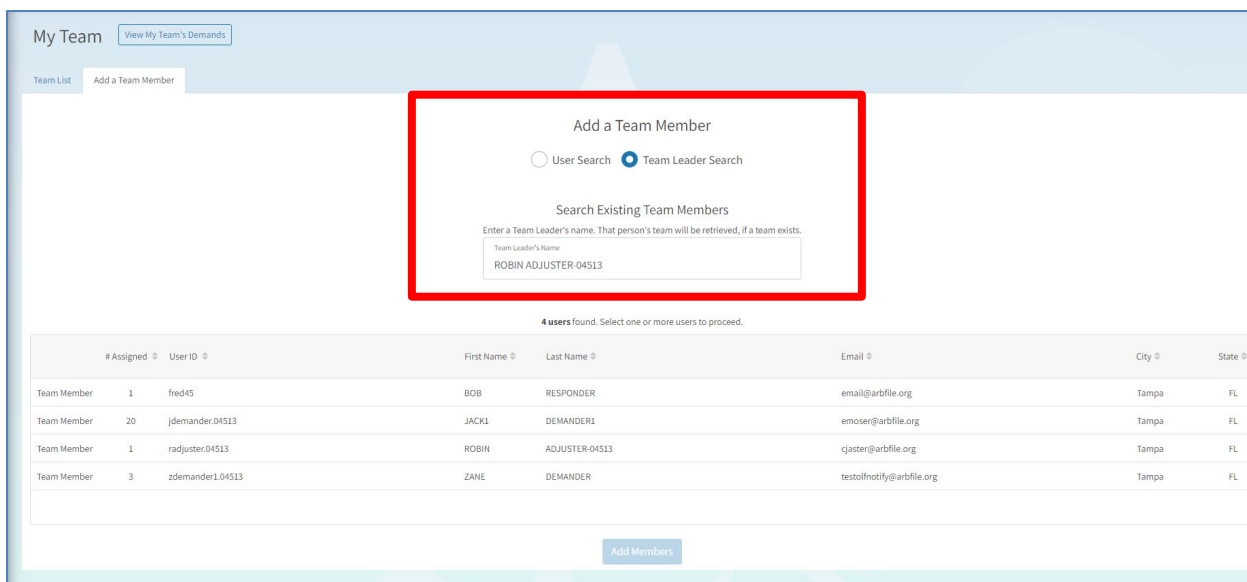
	# Assigned	User ID	First Name	Last Name	Email	City	State
<input checked="" type="checkbox"/>	1	fred45	BOB	RESPONDER	email@arbfile.org	Tampa	FL

Add Members

Team Leader Search

The “Team Leader Search” option allows a user to populate a team from the list of another user. A single team can be created from one or more existing teams by searching for the existing team leader. However, a single login can only have a one team at a time.

Enter a team leader’s name to find an existing group. Select one or all members of the team to add to your team by clicking “Add Members.”



My Team [View My Team's Demands](#)

Team List [Add a Team Member](#)

Add a Team Member

User Search Team Leader Search

Search Existing Team Members

Enter a Team Leader's name. That person's team will be retrieved, if a team exists.

Team Leader's Name

ROBIN ADJUSTER-04513

4 users found. Select one or more users to proceed.

	# Assigned	User ID	First Name	Last Name	Email	City	State
Team Member	1	fred45	BOB	RESPONDER	email@arbfile.org	Tampa	FL
Team Member	20	jdemander.04513	JACKI	DEMANDER1	emoser@arbfile.org	Tampa	FL
Team Member	1	radjuster.04513	ROBIN	ADJUSTER-04513	cjuster@arbfile.org	Tampa	FL
Team Member	3	zdemander1.04513	ZANE	DEMANDER	testofnotify@arbfile.org	Tampa	FL

Add Members

View My Team's Demands

The “View My Team’s Demands” button will return the user to their “My Team’s Demands” listing page.

My Team View My Team's Demands

Team List
Add a Team Member

ROBIN ADJUSTER-04513's Team Members

Remove Users

4 users found. Select one or more users to proceed.

Select All	# Assigned	User ID	First Name	Last Name	Email	City	State
<input checked="" type="checkbox"/>	20	jdemande04513	JACK1	DEMANDER1	emoser@arbfile.org	Tampa	FL
<input type="checkbox"/>	3	zdemande104513	ZANE	DEMANDER	testofnotly@arbfile.org	Tampa	FL
<input type="checkbox"/>	1	fred45	BOB	RESPONDER	email@arbfile.org	Tampa	FL
<input type="checkbox"/>	1	radjuster04513	ROBIN	ADJUSTER-04513	cjaster@arbfile.org	Tampa	FL