

Online Settlement Tool Guide

How to Locate the Online Settlement Tool:

- **Step 1:** To access the tool, navigate to AAA WebFile[®] located on the American Arbitration Association[®] homepage at <u>www.adr.org</u> and click on "My Account". Follow the login instructions. If you do not already have an account, please contact your case administrator.
- **Step 2:** Next, you may click on either "My Cases" within the sidebar on the left or click on "View My Cases" located on the main screen.

\equiv AAA WebFile®	American Arbitration Associate	ON* INTERNATIONAL CENTRE FOR DISPUTE RESOLUTION*	
n Home	Welcome Username		
🗇 My Tasks	НОМЕ		
Hearings & Conferences Calendar	What do you want to do?	2	
S All Open Invoices			
File a New Case Rules/Forms/Fees		[
🔅 ClauseBuilder [®] Tool	View My Cases	View Pending Tasks	File a New Case
Education & Training			
은 My Profile			
Switch to My Cases as a Panelist	View All Open Invoices	View My Calendar	Switch to My Cases as a
🕣 Sign Out			Panelist

Step 3: Locate the case within the "My Cases" Grid. To locate the case, use the search features at the top of the case grid as noted below.

≡ AAA WebFile [®]	AMERICAN ARBITRATI	ON ASSOCIATION®	INTERNATIONAL CENTRE FOR DISPUTE RESOLUTION*							
û Home	Walaama	ername								You have
My Cases	Welcome									
My Tesks	MY CASES									
Hearings & Conferences Calendar										
S All Open Invoices	You may search for cases	s by utilizing the AD	DITIONAL SEARCH option	or by typing text in the se	arch box ${\mathbb Q}$ at the top of	the relevant column and	press ENTER on your	keyboard. To search a	column for words "co	ntaining' specific text, use a p
E File a New Case	Company") in Claimant of	o find all cases whi olumn. You may sor	t cases in ascending or de	scending order using the	te in the search box abov arrows in the column hea	der. You may view all case	es or limit your view b	y selecting a category i	n the View menu.	ig the text ite (i.e. islue liech
Rules/Forms/Fees	ADDITIONAL SEARCH 🗸									Don't See Your Case? Vie
ClauseBuilder [®] Tool	1254	Q	Q	Q	Q	Q				
Education & Training U U U U	CASE NUMBER 🗸	STATUS 🗸	CLAIMANT 🗸	RESPONDENT 🗸	CASE MANAGER 🗸	NEXT EVENT ¥	PENDING TASKS	FILE/VIEW DOCUMENTS V	VIEW/PAY INVO	CES 🗸
My Profile	01 10 0500 1054	Active	Marchall Mathers	ABC Insurance	Kriste Desek	P. destruction in a starting				
Bwitch to My Cases as a Panelist	01-18-9500-1254	Active	Marshall Mathers		Knista Peach	01/16/19	\checkmark			
🕤 Sign Out	4									

Step 4: Once you have located the case, click on the associated case number to be directed to the case record. The Online Settlement Tool is located on the right-hand side of the case record and is titled "Make Settlement Offers".



How to Make an Offer:

Step 1: Within the case record, click on "Make Settlement Offers".

BACK TO ALL CASES						
CASE INFORMATION	TASKS EVEN	NTS FORM TEMPLATES	DOCUMENTS FINANCE	VIEW OFFER HISTORY		
Case Caption: Marshall Ma Case Number: 01-18-9500	athers v. Progressive 1-1254				File Additional Claim/Counterclaim	Make Settlement Offers
ADR Process: Applicable Rules: Filed Date: Track: Claim Amount: Case Status: Hearing Locale:	Arbitration MN No-fault Automote 11/1/2018 Regular 83,666.00 <u>(View Post</u> Active St. Paul, Minnesota,	ple insurance Arbitration Rules unterstit	Case Manager: Krists Prach U.S. Bank Plaza 200 South Schth Street, Suite 700 Minnespolis, MM 55402 Phone: (706) 613-2700 Email: <u>pagerism.adr.co</u> 9		Upcoming Event January 166 Jone 01/15/2019 Jane 01/15/2019	
Participants						Frint Service List
PARTY NAME	ROLE	LEAD REPRESENTATIVE	SECONDARY REPRESENTATIVE		CLAIM INFORMATION	
Marshali Mathers	Claimant	Mark Brandenburger c/o McSweeney / Langevin LLC 2116 2nd Avenue South Minneapolis, MN S5404 (706)613-2700 ga@prism.adr.org	N/A		Claim Amount: \$3,968.00 Claim Type: Claim Claim Received: 11/01/2018 Insurance Claim Defails Claim Number: \$57276	

Step 2: Under the heading "Make Offer", complete each of the required boxes.

te offer				
nter the details of your settleme	ent offer below. Once an offer is sub	mitted, it will be	transmitted to the other party. Any o	ffers accepted will b
y law or applicable rule. For nor our offer.	n-monetary settlements or partial se	ttlements of any	y claim/counterclaim/crossclaim on	this matter, please c
			Enter itemized amounts below	
Submitted By: *	Expires on: *		DESCRIPTION	
ABC Insurance	01-Feb-2019			
Offer Type: *	Lump Amount: *			
Lump	× \$5,000,00			
omments (optional):				
omments (optional): Full and Final Settlement . We will s	split the arbitrator compensation.			
omments (optional): Full and Final Settlement . We will s	split the arbitrator compensation.			
omments (optional): Full and Final Settlement . We will s	split the arbitrator compensation.]			
omments (optional): -ull and Final Settlement . We will s	split the arbitrator compensation.			
omments (optional): -ull and Final Settlement . We will s	split the arbitrator compensation.]			
omments (optional): -ull and Final Settlement . We will s	split the arbitrator compensation.			
omments (optional): 'uli and Final Settlement . We will s	split the arbitrator compensation.]			
omments (optional): Euil and Final Settlement . We will s	split the arbitrator compensation.			
ommenta (optional): Full and Final Settlement .We will s	split the arbitrator compensation.			
omments (optional):	split the arbitrator compensation.			
omments (optional):	split the arbitrator compensation.			
omments (optional):	split the arbitrator compensation.			
omments (optional):	split the arbitrator compensation.			
omments (optional):	split the arbitrator compensation.			
ommenta (optional):	split the arbitrator compensation.			
ommenta (optional):	split the arbitrator compensation.			
ommenta (optional):	split the arbitrator compensation.			
ommenta (optional):	split the arbitrator compensation.			
ommenta (optional): Full and Final Settlement . We will s	split the arbitrator compensation.	ß	Cancel	submit Offer

Step 3: After all of the information has been added, click "Submit Offer". A pop-up box will appear to confirm the offer has been successfully transmitted.



How to Review My Pending Offers:

Step 1: Within the case record, click on "View Offer History".

Step 2: Locate the offer with a status of "Active". Click "View" to view the offer details.

Welcome	Username									
BACK TO ALL C	ASES									
CASE INFORM	ATION	TASKS	EVENTS	FORM TE	EMPLATES	DOCUMEN	TS	FINANCE	VIEW OFF	ER HISTORY
Case Caption Case Numbe	1: Marsha r: 01-18-950	II M. v. ABC In 0-1254	surance						Case Manager: Phone:	Krista Peach ga@prism.adr.org (706) 613-2700
Case Caption Case Numbe Submitted on	1: Marsha r: 01-18-950 Submitted By	II M. v. ABC In 0-1254 Submitting Party	surance Amount	Offer Type	Offer Details	Status	Responsded By	Responde	Case Manager: Phone:	Krista Peach <u>ga⊜erism adrorg</u> (706) 613-2700

How to Retract an Offer or Extend the Expiration of an Offer Due Date:

- **Step 1:** Navigate to the case record.
- Step 2: Click on "View Offer History".
- **Step 3:** Locate the offer with a status of "Active". Click "View" to view the offer details.
- **Step 4:** In the top right-hand of the screen, click "Actions" and use the drop down box to select either Retract Offer or Extend Expiration Date.

Retraction Note: Please note that you cannot retract an offer if the offer has been accepted.

offer Details			Manager: K
Submitted On: Submitted By:	13-Dec-2018	Actions - Exter Retra	d Expiration Date
Submitting Party:	Marshall		
Offer Type:	Lump		
Status:	Active		
Expires On:	01-Feb-2019		
TOTAL AMOUNT OFF	ERED:	\$5,000.00	1-800-778-7879 ontact Your Cas
Full and Final Settleme	ent. We will split the arbitrator c	compensation.	

Extension Note: You can extend an offer; however, you cannot move it to an earlier due date.



How to Respond to an Offer or Counteroffer:

If the opposing party makes an offer or counteroffer, you will receive an email with notice of the offer/counteroffer. To view the offer/counteroffer, log-in to AAA WebFile and follow the steps below.

- **Step 1:** Navigate to either "My Tasks" within the sidebar on the left or click on "View Pending Tasks" located on the main screen.
- **Step 2:** Within the tasks grid, locate and click on the task "Review Settlement Offer/Counteroffer" for the corresponding case.
- **Step 3:** You will be directed to the case record. In the "Pending Case Tasks" grid, click on the task "Review Settlement Offer/Counteroffer".

Welcome '	
BACK TO MY TASKS	
CASE INFORMATION TASKS EVENTS FORM TEMPLATES DOCUMENTS FINA	NCE VIEW OFFER HISTORY
Case Caption: Marshall iv. Case Namber: 01-18-9500-1254	Case Manager: Kviss Peach ge@dentes.edi.org Phone: (706) 613-2700
Pending Case Tasks	🕒 Create a Task
Task (Task Name)	Due Date
Review Settlement Offer	01-Feb-2019

- Step 4: Next, click on "View" under "Offer Details".
- **Step 5:** Once you have reviewed the offer, click "Close" and navigate to the "Respond to Offer" section as noted below. You may elect to counter, accept or reject the offer within this section.

Respond to Offer			
Enter your response to the settlement offer law or applicable rule. Note that offers may	below. Once a response is submitted, it will labeled either "Lump" or "Itemized", to see t	be transmitted to the other party. Any offers accepted will be for the case as a whole and shall become binding as s he details about the offer being made, click View under Offer Details in the Current Offer grid.	soon as it is accepted, unless otherwise specified by
Response: *	Expires on: *	Enter itemized amounts below.	
Counteroffer 🗸	11-Jan-2019	DESCRIPTION	AMOUNT
Submitted By: •	Lump Amount: *		
offer Type:★	\$2,500.00		
Lump			
Comments (optional):			
Par, marana comprete, apin 200 Peet 1			
		TOTAL OFFER AMOUNT :	\$2,500.00
	Å	Cancel Submit Response	
3,000 character limit.			