

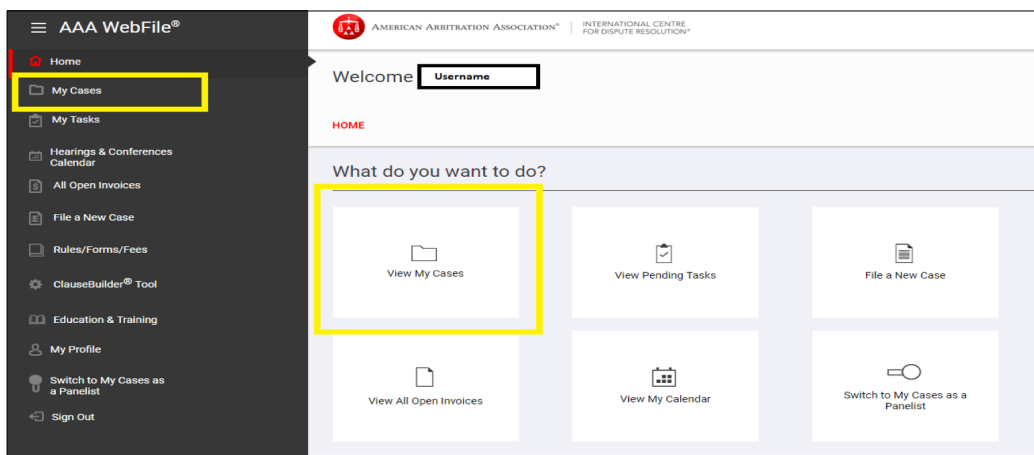


## Online Settlement Tool Guide

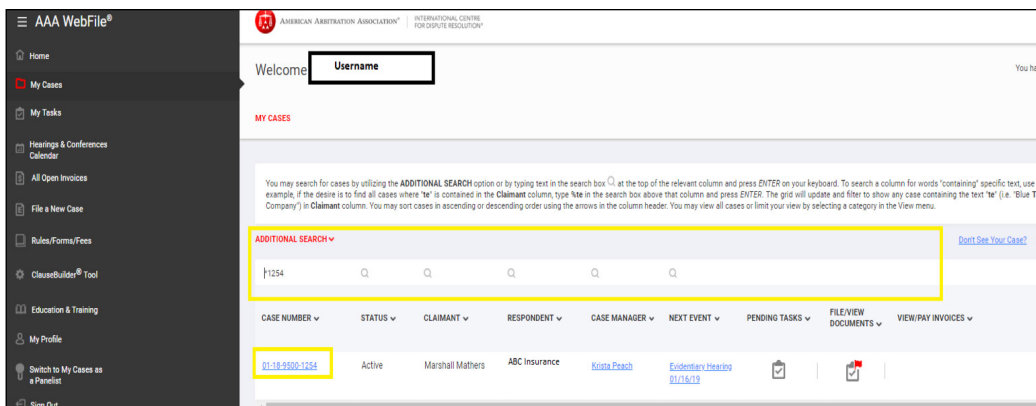
### How to Locate the Online Settlement Tool:

**Step 1:** To access the tool, navigate to AAA WebFile® located on the American Arbitration Association® homepage at [www.adr.org](http://www.adr.org) 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.



**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.



**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”.

The screenshot shows a web interface for a case record. At the top, there are navigation tabs: CASE INFORMATION, TASKS, EVENTS, FORM TEMPLATES, DOCUMENTS, FINANCE, and VIEW OFFER HISTORY. The main content area displays case details for 'Marshall Mathers v Progressive' (Case Number: 01-18-9500-1254). A red button labeled 'Make Settlement Offers' is highlighted with a yellow box. Below this, there are sections for 'ADR Process', 'Applicable Rules', 'Filed Date', 'Track', 'Claim Amount', 'Case Status', 'Hearing Locale', 'Case Manager', and 'Upcoming Event'. The 'Upcoming Event' section shows a calendar for January 16, 2019, with an 'Evidentiary Hearing' scheduled for 10:30 AM (Central Time) at 444 Cedar Street, Suite 1250, St. Paul, MN 55102. A 'Participants' table is also visible, listing Marshall Mathers as the Claimant, represented by Mark Brandenburger.

**Step 2:** Under the heading “Make Offer”, complete each of the required boxes.

The screenshot shows the 'Make Offer' form. The title bar is red and says 'Make Offer'. Below the title, there is a paragraph of instructions: 'Enter the details of your settlement offer below. Once an offer is submitted, it will be transmitted to the other party. Any offers accepted will be for by law or applicable rule. For non-monetary settlements or partial settlements of any claim/counterclaim/crossclaim on this matter, please contact your offer.' The form has several input fields: 'Submitted By:' with a dropdown menu showing 'ABC insurance'; 'Expires on:' with a date picker set to '01-Feb-2019'; 'Offer Type:' with a dropdown menu showing 'Lump'; and 'Lump Amount:' with a text input field containing '\$5,000.00'. There is also a 'Comments (optional):' text area with the text 'Full and Final Settlement - We will split the arbitrator compensation,]'. At the bottom right, there are two buttons: 'Cancel' and 'Submit Offer'. A '3,000 character limit.' note is visible at the bottom left of the comments area.

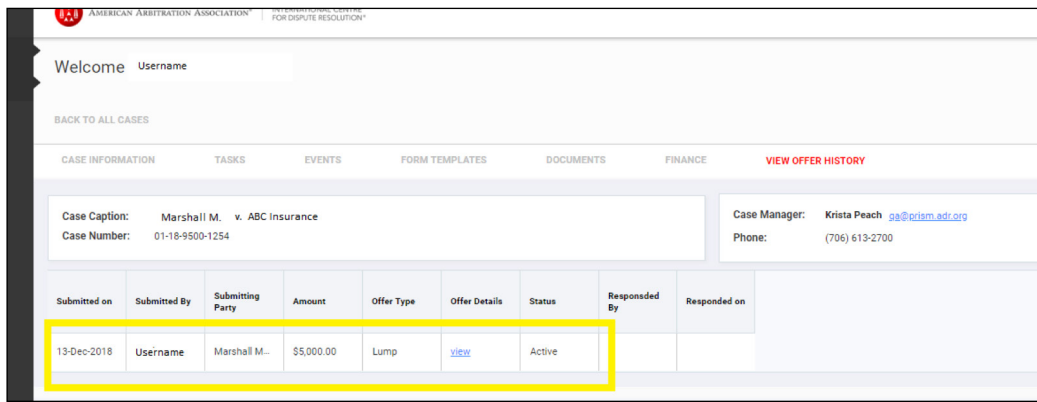
**Step 3:** After all of the information has been added, click “Submit Offer”. A pop-up box will appear to confirm the offer has been successfully transmitted.



## 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.



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

**Step 1:** Navigate to the case record.

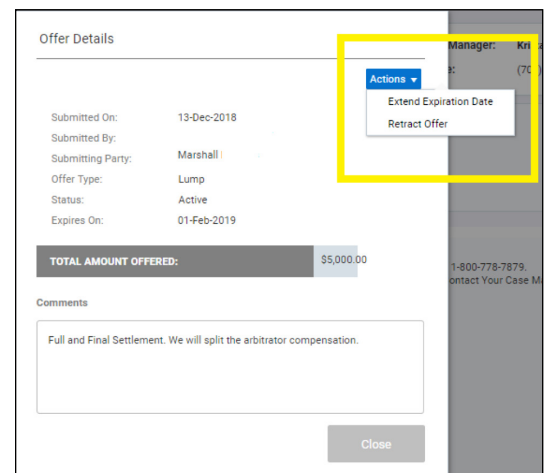
**Step 2:** Click on "View Offer History".

**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.

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

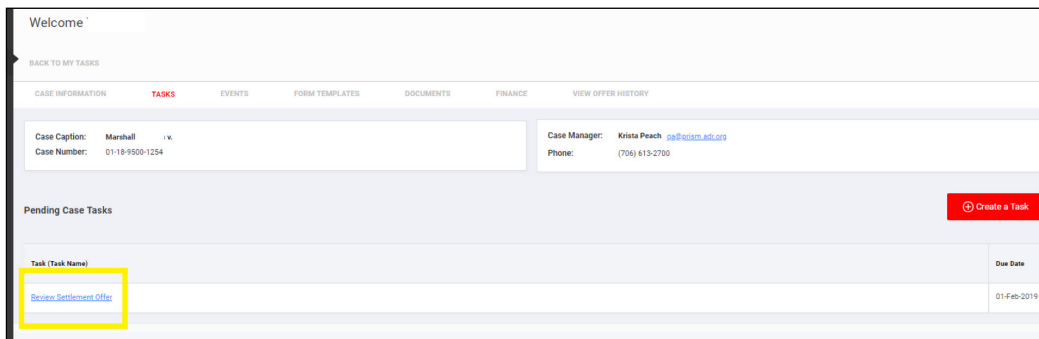




### How to Respond to an Offer or Counteroffer:

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”.



**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.

