Recovering Party Requests Deferment (submits a partial filing)

1. After the Incident Details and My Party Information workflow step is completed and a Case ID is established, the **Case Actions** option will appear.

   - The **Add Deferment** option is selected.
   - A **Deferment Reason** must be selected and **Deferment Justification** entered. Evidence may also be attached, i.e., proof of litigation, pending BI, etc.

2. A banner will appear on each subsequent workflow step until the filing is submitted. It reminds the filer that they have a pending deferment request, and allows them to edit or delete the request.

3. The **Add Deferment** option is selected.
   - The required fields are different since the filing will be deferred.

   **Required Entries**
   - Coverage
   - Adverse Party & Adverse Party Information
   - Coverage Information (Policy Limits acceptance)
Total Recovery Solution® (TRS®) Deferments

- Feature Info (Vehicle Year/Make/Model, Driver)
- Counterclaim Response Assertions

Optional Entries
- Liability Arguments: will be required when deferment expires/case proceeds to a liability decision
- Feature Damages Info: same as above

A banner advises that Liability Arguments and Feature Damages are not required:

Liability Arguments
You are not required to enter your liability arguments while the case is deferred. You will receive another opportunity to address liability when the case is no longer deferred.

Company-Paid Damages
You are not required to enter your damage amounts while the case is deferred. You will receive another opportunity to address your damages when the case is no longer deferred.

6. After the filing is submitted and deferred, the recovering party can access the case to withdraw the deferment.

Responding Party
1. The filing appears on the worklist as “Deferred – In Progress”
2. The deferment may be challenged using the Case Actions on Case Summary or selecting Challenge Deferment on the banner.

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3. If challenged, the deferment will immediately transition to the **Ready to Hear** queue where the challenge will be ruled on by an arbitrator.
   - If deferment is allowed, the case will remain deferred and the parties advised.
   - If deferment is not allowed, the parties are advised. The recovering party will have to submit a complete filing and the normal process will begin.

4. The responding party must also assert an exclusion to compulsory arbitration by using the **Enter Response** functionality. As above, the exclusion will be sent to immediate hearing by an arbitrator.
   - If exclusion is granted, the filing is closed (one responding party) or the party(ies) is removed from the case (multiple responding parties)
   - If exclusion is not granted, the case remains deferred and the parties notified.

### Responding Party Requests Deferment

1. A responding party can defer a filing (Alpha has submitted a complete filing) within the **Enter Response** workflow using **Case Actions**.

2. A **Deferment Reason** must be selected and **Deferment Justification** entered. Evidence may also be attached, i.e., proof of litigation, pending BI, etc.
3. A banner will appear on each subsequent workflow step until the response is submitted. It reminds the rep that they have a pending deferment request, and allows them to edit or delete the request.

4. The required fields are different since the filing will be deferred.

    Required Entries
    • Coverage Response (Liability Policy In Effect, Coverage Denied, Policy Limits)

5. After the response is submitted and the filing deferred, the requesting party can access the case to withdraw the deferment.
Recovering Party

1. The filing appears on the worklist as “Deferred – In Progress”
2. The deferment may be challenged using the Case Actions on Case Summary or by selecting Challenge Deferment on the banner.