

Mediate.com Case Manager

Users Manual

~~ Updated November 11, 2010 ~~

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Overview

The screenshot shows the Mediate.com ADR Case Manager interface. At the top, the title bar includes the Mediate.com logo and the text "Mediate.com ADR Case Manager" (1). To the right of the title bar are navigation links: "EDIT" (2), "SETTINGS" (3), "REPORTS" (4), and "MAIL" (5). Below the title bar is a blue navigation bar with "DISPLAY: All Staff & Rooms" and a dropdown arrow. The main content area is divided into two sections: "CALENDAR" (6) and "ACTIVITIES" (7). The "CALENDAR" section shows a calendar for September 2010 with a dropdown arrow and a print icon. The "ACTIVITIES" section is a table with columns: "Date" (8), "Start/End" (9), "Type" (10), "Case" (11), "Who" (12), "Notes", and "Staff". Below the main content area is a "CASES" section (8) with a search bar (10) and a dropdown arrow. The search bar contains the text "Case #, case name, last name, email". To the right of the search bar are checkboxes for "OPEN CASES ONLY" (11), "SELECT FIELDS" (12), and "EXPORT" (13). Below the search bar is a table with columns: "ID" (13), "Case Name" (13), "Status/Outcome" (13), "Case Developer", "Mediators(s)", "Observer(s)" (11), "Initiated" (12), "Party 1" (13), and "Party 2".

- 1.) Display Menu
- 2.) EDIT Menu
- 3.) [SETTINGS Menu](#)
- 4.) REPORTS Menu
- 5.) MAIL Link
- 6.) CALENDAR Section
- 7.) ACTIVITIES Section
- 8.) CASES Section
- 9.) Add New Case
- 10.) Search Cases
- 11.) Open Cases Only
- 12.) Select Fields
- 13.) Export

Ordering

Order your Case Manager online at www.mediate.com/CaseManager

Model Options

When you order your Case Manager, you will be asked which model you prefer.

- 1) **Private Practitioner Level.** This is for the solo practitioner, who may have an assistant or an observer, but who handles most of the mediations him or herself. This is FREE for 2010, and the Charter Price on 1/1/11 will be \$399 per year or \$39 per month.
- 2) **Enterprise Level.** This is for a Court Agency, Dispute Resolution Panel, or Center. It allows the user to track unlimited cases, and to create secure access for every mediator, staff member, and volunteer. This is FREE for 2010, and the Charter Price on 1/1/11 will be \$1399 per year or \$139 per month.

Ordering Options

After you have added the Case Manager to your cart, you can select the options that you prefer.

- 1) **Types of Cases:** The Case Manager will ask you to describe what type of cases you handle. For instance, if your primary type of case is a mediation, then the Case Manager will create default settings that are most supportive of mediation. All of these settings can be changed and customized to what best suits your particular practice.
- 2) **Business:** It will ask you to describe your type of business. Please select the best option from the drop down menu, such as Mediation, Arbitration, etc.
- 3) **Case Numbering:** The Case Manager will ask if you would like to begin tracking your cases with a particular number. For instance, if you are currently working on case #3172 and you would like a seamless transition for your record keeping, enter 3173 as your next desired case number. The Case Manager will automatically assign this as a unique case identifier for every one of your cases. Please note that for cases with non-numerical or court-assigned names, there is a separate field where you can manually enter in each case name.
- 4) **Case Manager Name:** You will be prompted to enter in the name of your Case Manager. For instance, will this be a company wide Case Manager, will it manage only mediations, or perhaps you would like it to be listed under your name so that all users will know that you are the administrator.

Logging-in

Access the Case Manager at www.mediate.com/cases and enter your UserID and Password. This is your email address and Mediate.com password. You will have received these in your confirming email. When you add your additional staff members in the Getting Started section, you will enter their email address and be able to create a password for them. Remember this password so that you can give it to them as their log-in information.

To access your Case Manager, you need to be able to connect to the internet. From there, you will log-in to the secure site and be able to access the program. The Case Manager is not software or a program that you download to your computer, or a disk that you will carry around with you. Instead, you will store all of your information online. This allows you the flexibility for you and any of your approved staff or mediators be able to access all of the information from any computer with a secure connection. The Case manager can currently be accessed from the iPad and iPhone, but an app has not yet been designed for it.

Getting Started



SETTINGS Menu

Your first step to using your Case Manager will be to personalize your settings. You can come back and change these at any time.

Click on the **SETTINGS** button in the blue navigation bar at the top of your screen. This is the 3rd button from the left. The **SETTINGS** button contains a drop down menu with these 6 options: 1) Referral Sources, 2) Case Status/ Outcome, 3) Case Types, 4) Staff Types, 5) Activity and Calendar Types, and 6) Global Settings.

- 1) **Referral Sources:** You can edit your referral sources list to include any source. To add to this list, simply click on the ADD button. When adding or editing a referral source you can also change the Sort Order.
- 2) **Case Status/ Outcome:** The case status/outcome menu is useful to keep track of your cases and to easily categorize their outcome when you are compiling final reports. To add a new designation, select the ADD button, input your new designation, and then add the appropriate Sort Order.
- 3) **Case Types:** The Case Types menu allows you to select the types of cases that you will be working with most frequently in your mediation practice. You can create different layers of cases. For instance, "Mediation" can be your top layer, with "Family" as a case type underneath it. You might want to further break out Mediation>Family into a third layer with the types of family mediation you work on. This is also a convenient place to list your pay rate if it is set for certain types of cases.
- 4) **Staff Types:** Creating the appropriate Staff Types menu allows you to appropriately designate your staff later when you are working on cases. When you add a new staff, these can again be sorted in your desired order.
- 5) **Activity and Calendar Types:** Activity and Calendar Types have some cross over. For instance, you might schedule a phone call on your calendar, or a client might unexpectedly call in with important information on your activity log. So a phone call is something that should be included in both activity and calendar types. There might be many other forms of communication and interaction however that you use more or less frequently, that you determine should only be associated with only one activity or another.
- 6) **Global Settings:** Changing your global settings affects your overall Case Manager. Changing some of these settings will also change the default settings throughout your Case Manager.



DISPLAY: All Staff & Rooms

EDIT **SETTINGS** REPORTS MAIL

CALENDAR MONTH DAY PRINT

<< July 2010 >>

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

ACTIVITIES

Date	Start/End	Type	Case	W
------	-----------	------	------	---

- Referral Sources
- Case Status/Outcome
- Case Types
- Staff Types
- Activity and Calendar Types
- Global Settings

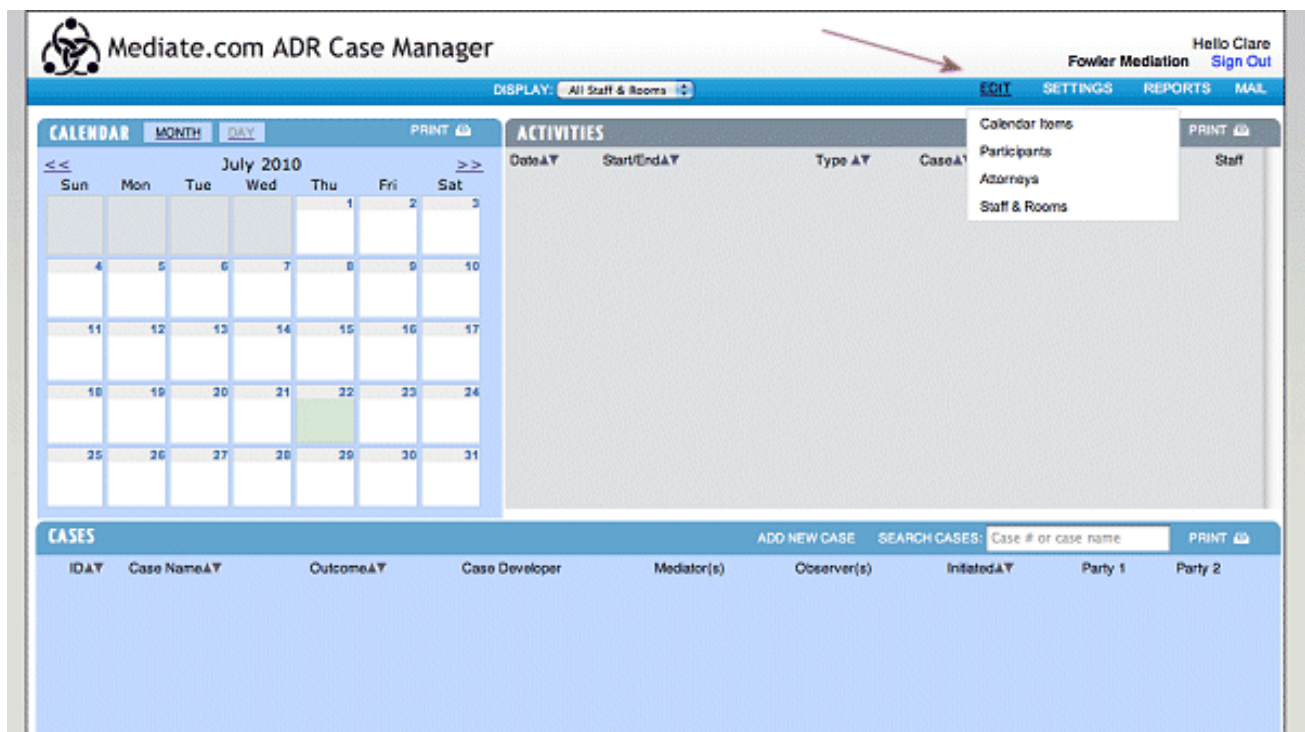
CASES ADD NEW CASE SEARCH CASES: Case # or case name PRINT

ID	Case Name	Outcome	Case Developer	Mediator(s)	Observer(s)	Initiated	Party 1	Party 2
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EDIT Menu

To edit options and information in your Case Manager, select the **EDIT** button in the upper blue navigation bar, and a drop down menu will appear. The EDIT button is the 2nd from the left. This menu allows you to edit 4 sections: 1) Calendar, 2) Participants, 3) Attorneys, and 4) Staff & Rooms.

- 1) **Calendar:** Your first option is to edit your Calendar Items. By selecting this, you will get a pop-up window with a list of calendar items. Note that the Start Date can be changed. To change any of these items, simply Double-Click on an item. Another pop-up window will appear allowing you to edit your calendar item.
- 2) **Participants:** By clicking on Participants, a window will pop-up listing all of the participants involved in all of your cases. This is a quick, easy way to update a client's information, remember which case they are associated with, or look-up their phone number.
- 3) **Attorneys:** The attorneys window allows you to see all of the contact information for the different attorneys you have worked with and what cases they were associated with.
- 4) **Staff & Rooms:** When you select EDIT > Staff & Rooms, a window will pop-up showing you the current list of staff and rooms available. It is simple to ADD new staff or a to select a new room by clicking on the **ADD** button in the upper-left. It is also handy to print out a page of all of the staff and room available, along with their title, their email, and their access by clicking the **PRINT** button in the upper-right.



The screenshot displays the Mediate.com ADR Case Manager interface. At the top, the logo and title "Mediate.com ADR Case Manager" are visible. The user is logged in as "Hello Clare" with a "Sign Out" link. The navigation bar includes "DISPLAY: All Staff & Rooms", "EDIT", "SETTINGS", "REPORTS", and "MAIL". A red arrow points to the "EDIT" button. A dropdown menu is open under "EDIT", listing "Calendar Items", "Participants", "Attorneys", and "Staff & Rooms". The main content area is divided into three sections: "CALENDAR" (showing a July 2010 calendar), "ACTIVITIES" (with columns for Date, Start/End, Type, and Case), and "CASES" (with columns for ID, Case Name, Outcome, Case Developer, Mediator(s), Observer(s), Initiated, Party 1, and Party 2). The "CALENDAR" section shows a calendar for July 2010 with a green highlight on the 22nd. The "ACTIVITIES" section is currently empty. The "CASES" section shows a table with headers for ID, Case Name, Outcome, Case Developer, Mediator(s), Observer(s), Initiated, Party 1, and Party 2.

Cases

There are 3 main sections to the Case Manager: Calendar, Activities, and Cases.

Add New Case

Let's begin in the Cases section, Click on **ADD NEW CASE**

A new window will pop-up that allows you to enter in information about your case. If you do not see this window, check to see if it has opened behind the current window you are using. Please note that you can add and edit additional text fields in your case record in **SETTINGS> Global Settings**.

This window allows you to enter information about the Case Type, the Referral Source, the parties, their attorneys, and the mediators and case developers.

When you first open the window, the default setting allows you to add three parties. To add additional parties, simply save the case record by clicking "Submit." When you reopen the case record you will see there is room to add more parties.

If you do not select a mediator, then the case will be visible as an Open Case for mediators to view and request to be considered as the mediator.

Mediate.com ADR Case Manager

Hello Clare
Fowler Mediation Sign Out

DISPLAY: All Staff & Rooms EDIT SETTINGS REPORTS MAIL

CALENDAR MONTH DAY PRINT

July 2010

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

ACTIVITIES ADD ACTIVITY PRINT

Date	Start/End	Type	Case	Who	Notes	Staff
------	-----------	------	------	-----	-------	-------

CASES ADD NEW CASE SEARCH CASES: Case # or case name PRINT

ID	Case Name	Outcome	Case Developer	Mediator(s)	Observer(s)	Initiated	Party 1	Party 2
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Case Record

Case Notes

A handy place to keep track of miscellaneous case information is in the Case Notes section. It is generally wise to date each notes entry and perhaps also enter your initials at the end of your note entry. Please note that when a mediator has not yet been assigned, the case information including notes are available to the mediation staff. This allows them to choose which cases they are interested in. It also means that the person entering the information in case notes must be aware of the information they are putting in.

Case Calendar and Activities

When you enter any activity or calendar item and associate it with a case, a summary of that item will be kept in your case record. To see the full description of the event, simply click on the item and an expanded description will appear.

Uploading Documents

The Case Record contains a link to upload documents. Currently, staff that are affiliated with a case can upload documents. At this time, parties cannot directly upload documents into a case file—but watch for this feature to be added in a future iteration of Case Manager.

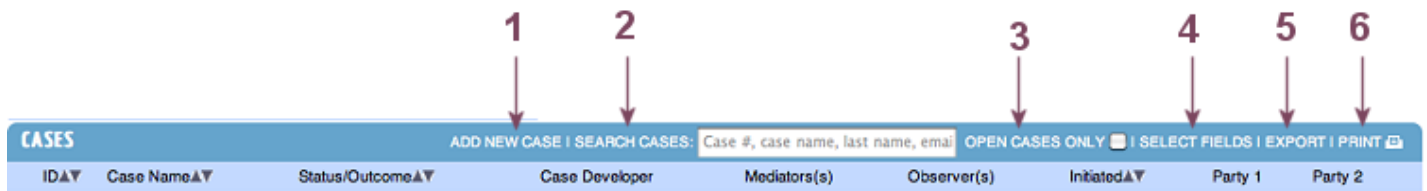
Time to Date

The time spent on the case is calculated by the total time spent on Activities and Calendar items. Thus, for this information to be accurate, the correct start and end time must be recorded for these events.

Billing

The final item on the case record is the account statement. This amount is roughly a running summary of the total cost for the case, minus any payments you have entered. They pay rate for each type of case can be set under SETTINGS> Case Types. It can also be set in the Case Record under Override. Finally, this pay can be set as an hourly charge, a meeting charge, or a one-time, all-inclusive charge.

Case Bar



In the Cases section, you will notice there are many option for managing your cases. These are arranged in the blue Case bar, just above the Cases Section.

- 1) **Add New Case:** Clicking Add New Case will open a pop-up window, which allows you to open up a new case.
- 2) **Search Cases:** Search Cases allows you to search within your cases by case number, the case name, the participants, the attorneys, or their email address.
- 3) **Open Cases Only:** Select this button filters your list of cases so that it will only show those cases that are currently open.
- 4) **Select Fields:** This link opens a pop-up window that allows you to choose which fields in your cases you would like to be visible. Selecting this button in the Case Bar allows you to select which case fields display for two different functions. The first function is which case fields are visible on your main case interface. In other words, if you want to always be able to see the names of the parties in your cases, then select "Parties."
The second function of the Select Fields list is determining which fields you would like to export. If you need to send someone a report your information, or if you will be using EXPORT to create a back-up of your information.
- 5) **Export** - This link allows you to save a copy of your desired case information. This is useful for creating reports or keeping a back-up of your information. A detailed description of how to export your information is available at the end of this guide in the Miscellaneous section.
- 6) **Print** - This button converts your information from a format that is easy to read online, to a screen that is easy to read on paper.

Calendar

Now that we have our settings configured, let's move on the second section of the Case Manager: **Calendar**. Your Case Manager Online Calendar is a great way to keep track of all of your upcoming Case Commitments.

Add New Calendar Item

To add an item to your Calendar, simply click on any date in the calendar and you'll see a new window pop-up that says "**Add New Calendar Item.**" Fill out your information, and Save at the bottom.

You can view your Monthly or Daily Calendar, create a printable version of your calendar, and easily skip backward or forward by month.

Viewing Calendar Items

Your Case Manager shows you your schedule for the day by clicking on the day you want to display. After you have added items to your calendar, you will see a quick summary listed on that day telling you how many events you have for that day: "1 item, 2 items," etc. To see an explanation of these items, simply click on any day and you will see a window pop up that gives you a listing of all of your Calendar items for that day.

You can also view a more complete list of calendar items. Click on the EDIT >Calendar items. This gives you a list of Calendar items that you can view, print, or edit. The default view for this list shows you every calendar item beginning two weeks prior to the current date. You can change this date by typing a new date in the top text field.

The complete list of calendar items that appears under EDIT>Calendar items can be printed to keep handy, or—depending on the software on your computer—can be turned into a pdf to mail to mediators, or a jpeg to post availability. This version of the Case Manager does not come with a calendar that can be synced up with additional calendars.

The screenshot displays the ADR Case Manager interface. On the left, a calendar for July 2010 is shown with a grid of days. A red circle highlights the 'Add Calendar Item' button. On the right, a detailed view of calendar items for Friday, July 30, 2010, is displayed. Below the calendar, a table lists various cases.

Time	Type	Case	Status	Notes	Hours
07:30-08:00A	Casework		open	Send court copy of all closed cases, and accounting for time spend on court-mandated mediations this month.	1
08:30A	Casework	Statin Plumbing	open	Do day long facilitation with Statin Plumbing Employees--try to finalize issues enough to have a working plan.	5
07:30/10 08:30A	Other		open	Do end of month tally, determine staff schedules and rooms for next month.	4
07:30/10 08:30A	Phone Outgoing	DiPalma v. Arbett	open	Arbett nervous about mediating with her ex-husband, wants to discuss videoconference and caucus options in case mediation gets heated.	1.5

ID	Case Name	Outcome
3020	Khajarian v. Student Movers	Mediation - Active
3019	Lion's Lighting	Mediation - Active
3017	Jones v. Wheeler	Party Unavailable
3016	Knox v. Rios	Mediation - Active
3015	Fowler v. Walker	Payment pending
3014	Williams v. Littlefield	Mediation - Resolved
3012	Casamar Construction and Deloitte Lending	Mediation - Active
3011	DiPalma v. Arbett	Party Declined

Activities

The third section of Your Case Manager allows you to keep track of all of your **Activities**. Examples include that you sent a fax, called a client, sent an email, spent time researching, drafting or the like.

To Add an Activity, click the **Add Activity** link.

You can add as much or as little information about your Activity on your Activity record as you desire. The more information you add, however, the more useful this activity will be when you are later preparing reports. One of the first fields in the Add Activity window is Contact Type. In other words, did someone phone into the office, walk-in, Skype, bring in a payment, send a fax, or email.

Additional elements of the activity entry include who is the participant and what staff member or mediator does this relate to. If you choose to associate the activity entry with a certain case, then they activity can also be referenced within the case record.

Add Activity Log Entry

[Close](#)

Associate with case:

Contact Type:

Start Date: Time: hh:mmAM

End Time: hh:mmAM

Name:

Phone:

Email:

Staff:

Referred by:

Specify Other:

If payment, amount:

Action taken:

Notes:

Associated Calendar Item: (follow up)

Date: Time: hh:mmAM

Type:

Staff:

Followup Notes:

Hello Clare
Fowler Mediation [Sign Out](#)

All Staff & Rooms: EDIT SETTINGS REPORTS MAIL

ACTIVITIES

[ADD ACTIVITY](#) [PRINT](#)

Start/End	Type	Case	Who	Notes	Staff

ADD NEW CASE SEARCH CASES: PRINT

Modiator(s)	Observer(s)	Initiated	Party 1	Party 2

Activities Hints

When you enter an Activity into your Case Manager, make sure to select the related case (if there is one) from the list "**Associate with Case.**" This means that when you are later looking at the Case Record, you will see a quick summary of all of the activities associated with that case.

Also, **Enter in the Start and End Time of the Activity** (when completed) in the form shown: e.g., 09:30AM . Case Manager will then calculate how much time you are spending on specific activities and specific cases.

Also note the handy "**Associated Calendar Item**" at the bottom of this pop-up window. This is a quick way to create a follow-up calendar item.

Billing

ADR Case Manager
Print Close

Edit Case

 Case Open
 Case Closed

Delete

Case ID - primary: 3015 Date Initiated: 07/28/10

Case ID - other: 3016 Date Closed:

Case Name:

Status/Outcome:

Types:

If Other, what type:

(Override) Pay Rate: \$ 5,000 total

(Override) Balance Due: 5,000

Your designation here:

Another designation here:

Referred by:

Other:

[Email all parties](#) [Email all parties AND staff](#)

Party 1: Participant: David Walker
[Add names this party](#) 541-378-6729
[Email](#) david@walkerlumber.com

Party 2: Participant: Amanda Fowler
[Add names this party](#) 541-789-7504
[Email](#) amanda10723@yahoo.com

Add Party 3

Participant: Name

Company

Address

Email

Phone

Attorney Name
look up

Notes: David is suing Amanda, case was referred to mediation. Amanda sold David a 24' toy hauler, David said it quit working two weeks later. He says that Amanda knew it was about to die. Amanda says that she has service records to prove she kept it in good condition.

[Update Case](#)

Documents [Upload Documents](#)

[Delete](#)

[Delete](#)

[Delete](#)

Calendar Items

[Add Calendar Item](#)

Time	Type	Status	Notes	Hours
09/07/10 08:30A	Casework	open	First Fowler/Walker mediation	8
09/20/10 08:30A	Casework	open	Tentatively scheduled mediation	8

Other Activities

[Add Activity](#)

Start/End	Who	Type	Notes	Staff	Pmt
07/30/10 12:13-12:45PM	Amanda Fowler 541-789-7504	Fax	Amanda faxed in all of her service records, as well as a gas receipt from the day before it was sold. She states this proves that it was running fine.		
08/03/10 9:48-9:50AM	allparticipants, case 10016	Email	subject: Possible Mediation	admin	

Total Hours: 16.57
Total Paid \$0.00

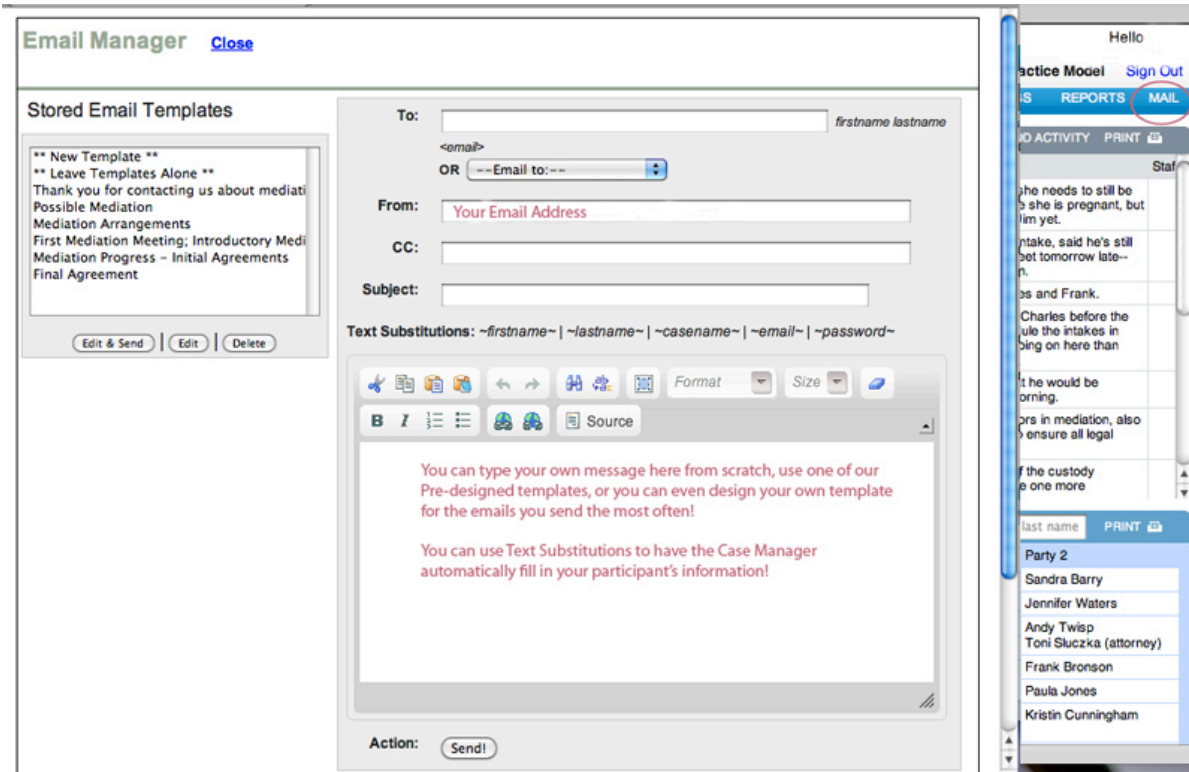
The Case manager provides a way for you to keep track of money due.

Under EDIT>Case Type, you can set the Pay Rate for types of cases. This is helpful IF you have a standard pay rate.

If you have a different system for tracking payments however, you can set the Pay Rate and balance due. You can set the charge by the hour, by the mediation session, or by a total amount. You can also keep track of any payments in your activities log.

To see a running total of your balance due, you can look in your case record. This number will always match your Money Charged minus any Payments Received.

Mail System



Your Case Manager allows you to send out mail directly from your Case Manager. To access your mail interface, click on the **MAIL** button at the top-right of your Case Manager. After you have clicked on the **MAIL** button, a new window will pop-up. This is your Mail interface. From here you can create your own mail, send one of the pre-designed templates, or create your own!

You can also add text substitutions to your email that will automatically populate with the desired information, such as firstname, email, casename, etc.

The email will automatically be sent from the person that is logged in the Case Manager.

After you have sent mail, your Case Manager stores it in three convenient places:

- 1) Mail Log: The Mail Interface also keeps a running log of all of the mail that has been sent out. This mail can be sorted. It is an easy way to review recent communication.
- 2) Activities List: It is stored in the activities list which can be filtered by user, so that you can see all of the email that a mediator sent out and what case it pertained to.
- 3) If you have associated the email with a particular case, that email will be stored as Email Manager Correspondence in the Case Record.

This is an example of the mail interface. You can see the templates on the upper left and the mail log underneath it. Remember mail is stored here in your mail interface, but also in the individual case file. A record of the mail that each mediator sends out can also be stored in activities log. It will be filtered and only displayed for the administrator and the mediator that has sent it. In other words, it is assumed that mediators would prefer to keep their communication confidential and so it is not made visible to other staff members.

Email Manager [Close](#) Mail has been sent to Nelson Sharp .

Stored Email Templates

**** New Template ****
**** Leave Templates Alone ****
 Thank you for contacting us about mediati
 Possible Mediation
 Mediation Arrangements
 First Mediation Meeting; Introductory Medi
 Mediation Progress - Initial Agreements
 Final Agreement

Stored Correspondence

Sent/From	To	Case	Subject
09/09/10 Case Manager Admin	Sharp	Sharp & Cunningham	Mediation Scheduling Change
09/09/10 Case Manager Admin	Sharp	Sharp & Cunningham	Kristin Cunningham
09/09/10 Case Manager Admin	Colson	Colson v. Barry	Confirmation of document posting
09/09/10 Case Manager Admin	Colson	Colson v. Barry	Received Mediation Documents
09/09/10 Case Manager Admin			Twisp v. Twisp Mediation

To: Nelson Sharp <NSharp@deloitte.org> firstname lastname <email>
OR +
to be filed with case 55002: Sharp & Cunningham Not this case

From: Case Manager Admin firstname lastname <email>

CC: firstname lastname <email>

Subject:

Text Substitutions: ~firstname~ | ~lastname~ | ~casename~ | ~email~ | ~password~

Hello Nelson,

Thank you for your prompt payment.

This is to acknowledge that your mediation has been paid in full.

I note that you have also requested a copy of the receipt on our company letterhead for your records, and we will get that in the mail to you shortly.

body p

Action:

Miscellaneous

EXPORT Data

You are able to back-up and save your entered case data to an Excel file at anytime.

To Save Your Case Manager Files

On your main Case Manager page click the **EXPORT** link.

You will get a little window asking you if you want to open or save your files, You will want to **Save**. Now select a location to save your file. Perhaps create a folder on your desktop named Case Manager and save it there.

To View Your Case Manager Files as a Spreadsheet

Open Your Microsoft Excel program and click **File** and then **Import**

Browse to the location of your saved .txt file and click **Open** (PC) or **Get Data** (Mac)

You will be selecting **Text file** on the next screen and click the **Import** button

Select **Delimited** on the next screen and then click **Next**.

Select **Tab** on the next screen and then click **Next**.

Just click **Finish** on the next screen

You will now be viewing your data in a spreadsheet

Reports

The reports menu of the Case Manager currently has a few premade reports. More reports will be added automatically to your Case Manager, and you will receive an email every time it is updated.

Currently the reports allow you to keep track of all of your open cases in a way that allows other mediators to request to be added on to a case. The reports link also allows you to create printable and sendable reports for the types of cases you have mediated and the time spent on certain activities.

Feedback

If you have any feedback, comments, suggestions, concerns, or applause for the Case Manager, simply click on the **Feedback** button on the upper-right corner of the screen. This will automatically send an email to the Case Manager designers who will respond to you quickly.

Assistance

The best way to receive assistance for the Case Manager is by describing the problem in an email by utilizing the **Feedback** button. If you have received any type of an error message, please copy the message in its entirety and paste it into your message.

If you need immediate assistance, then please call the Mediate.com office at 541-345-1629. The office is open during normal business hours.