Mediate.com Case Manager

Users Manual

~~Updated November 11, 2010~~

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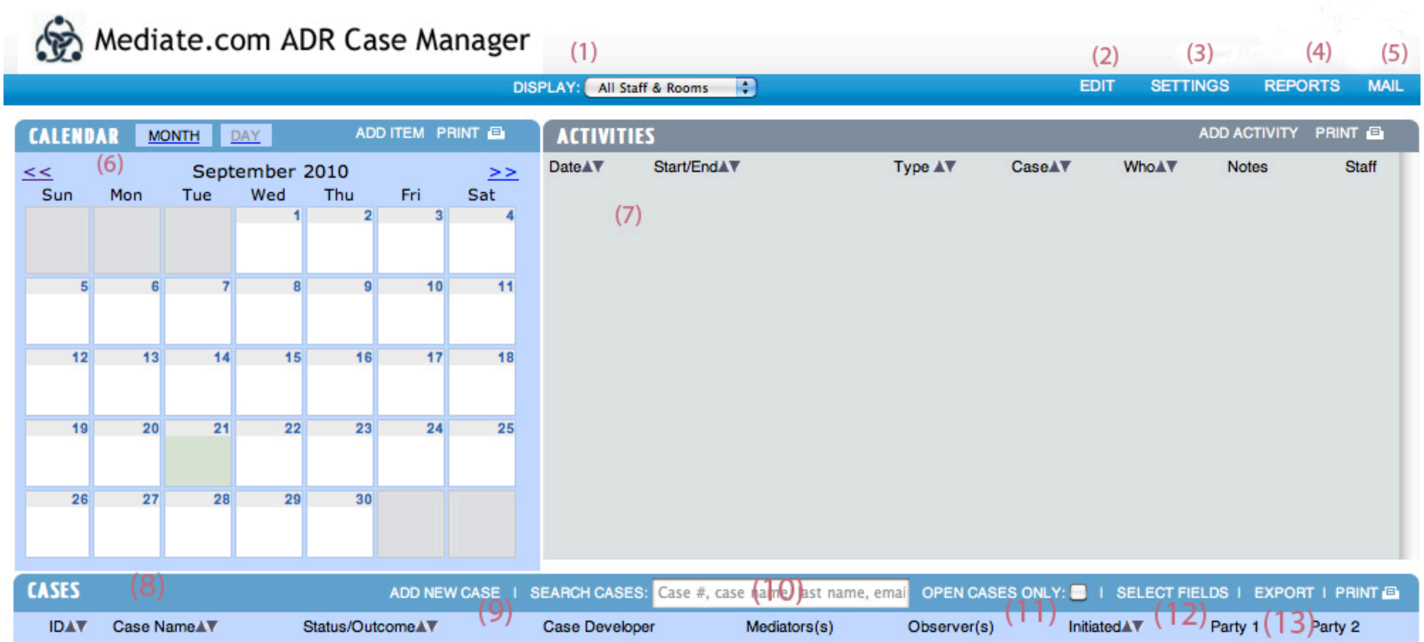

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Ordering

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 you 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.

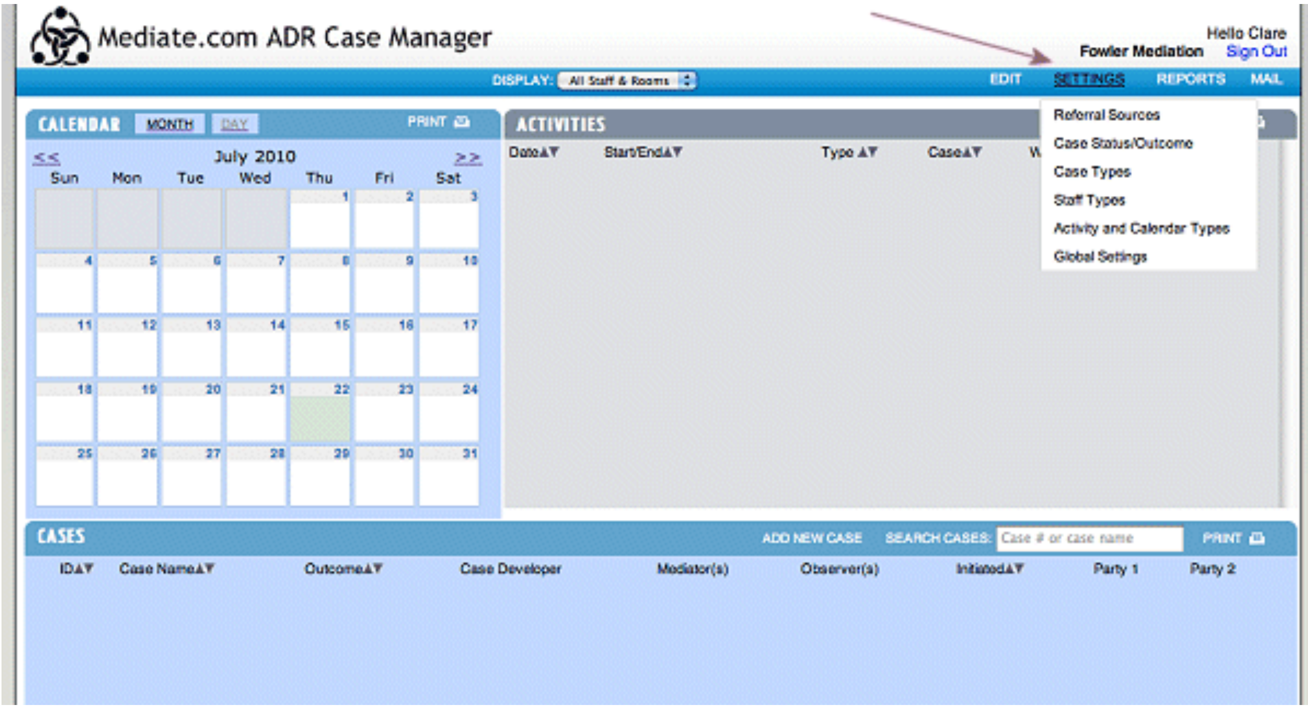
To access your Case Manager, you need to be able to connect to the internet. From there, you will log-in to the secure site and be able to access the program. The Case Manager is not software or a program that you download to your computer, or a disk that you will carry around with you. Instead, you 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.

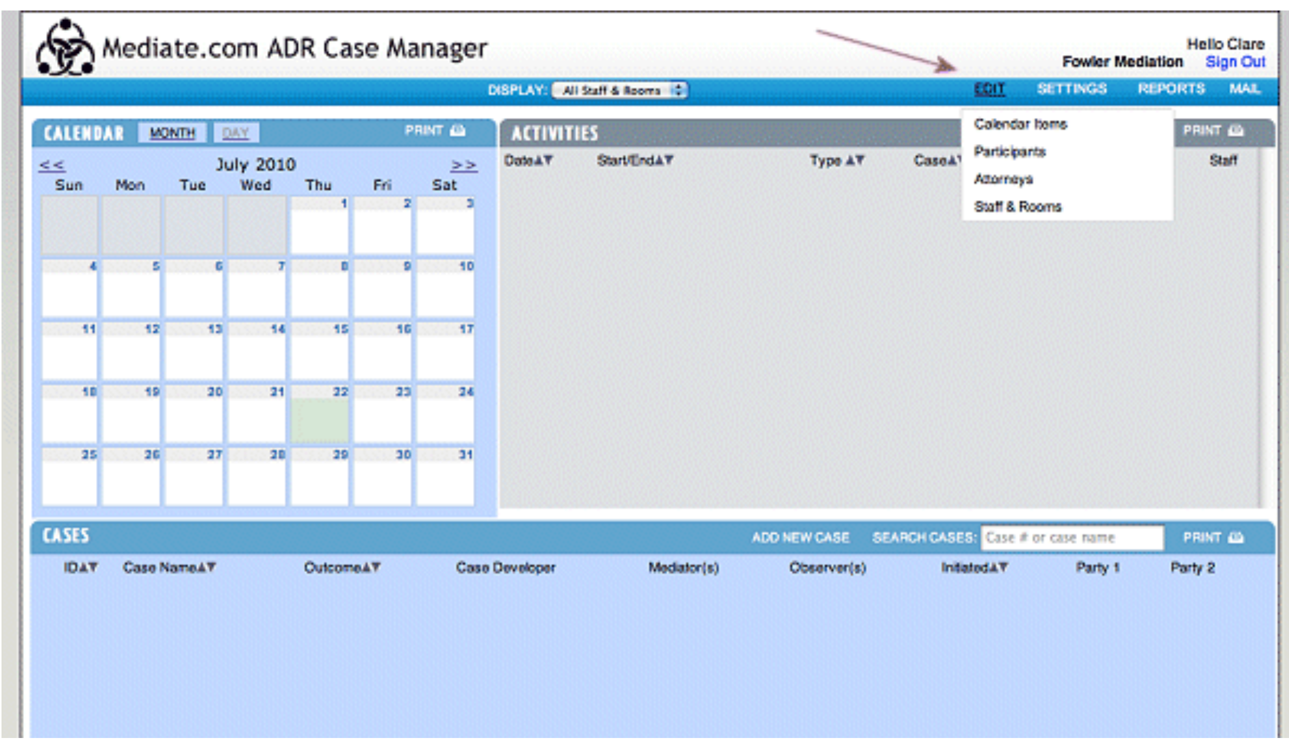
1) **Referral Sources**: You can edit your referral sources list to include any source. To add to this list, simply click on the ADD button. When adding or editing a referral source you can also change the Sort Order.
2) **Case Status/ Outcome**: The case status/outcome menu is useful to keep track of 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.


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
ACTIVITIES
Date
Start/End
Type
Case
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

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 to 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.



Cases

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

Add New Case

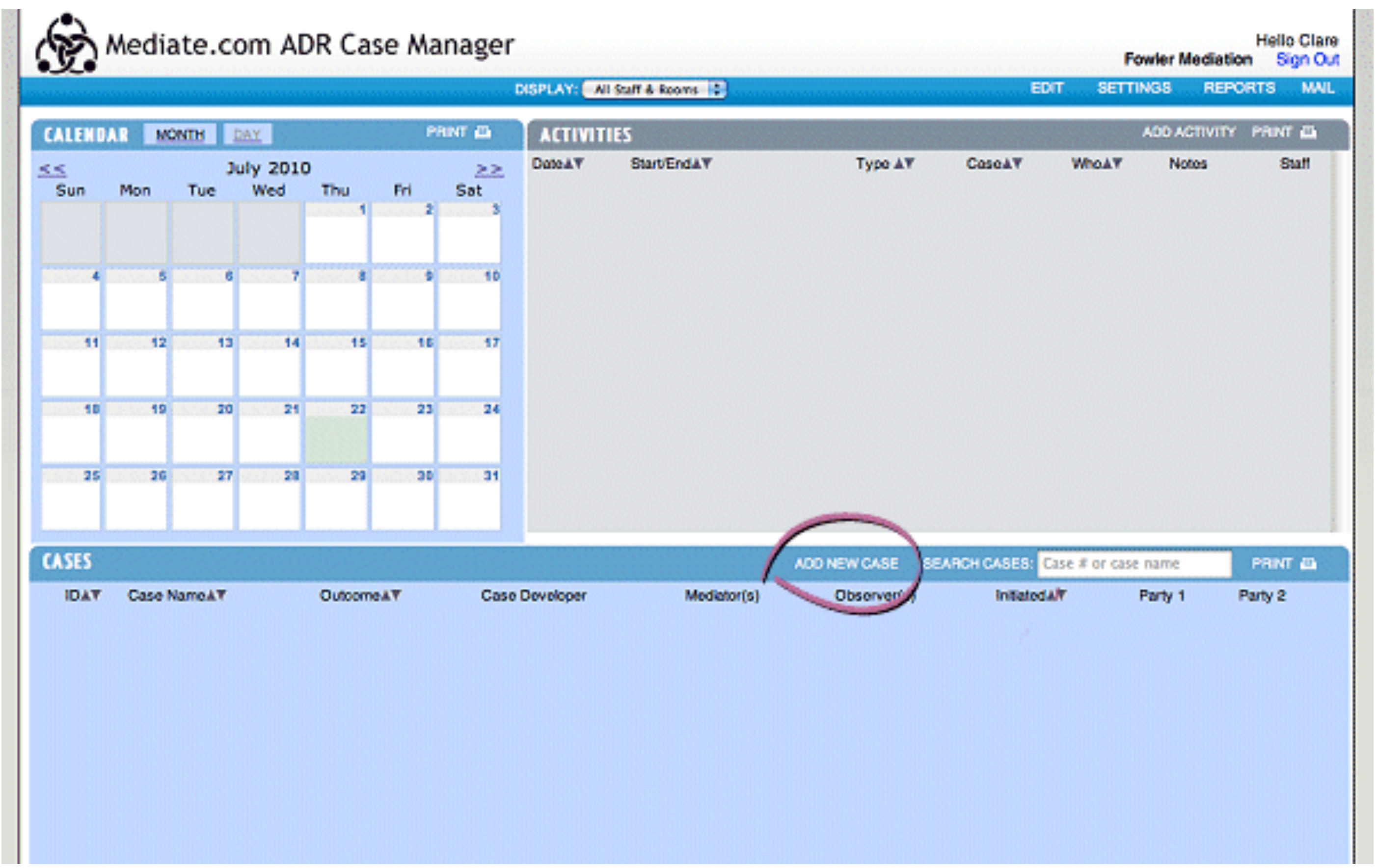
Let's begin in the Cases section, Click on **ADD NEW CASE**

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.



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.

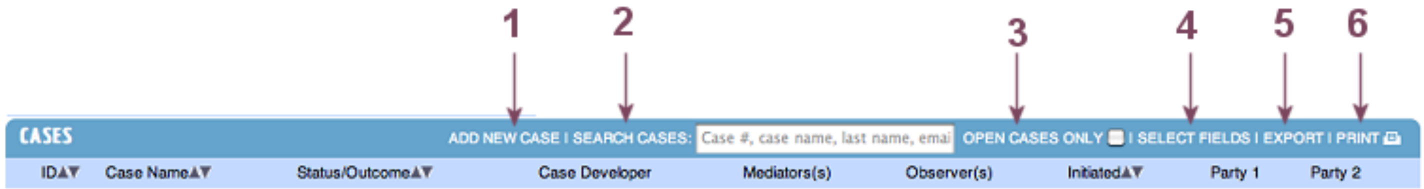
Case Calendar and Activities
When you enter any activity or calendar item and associate it with a case, a summary of that item will be kept in your case record. To see the full description of the event, simply click on the item and an expanded description will appear.

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.

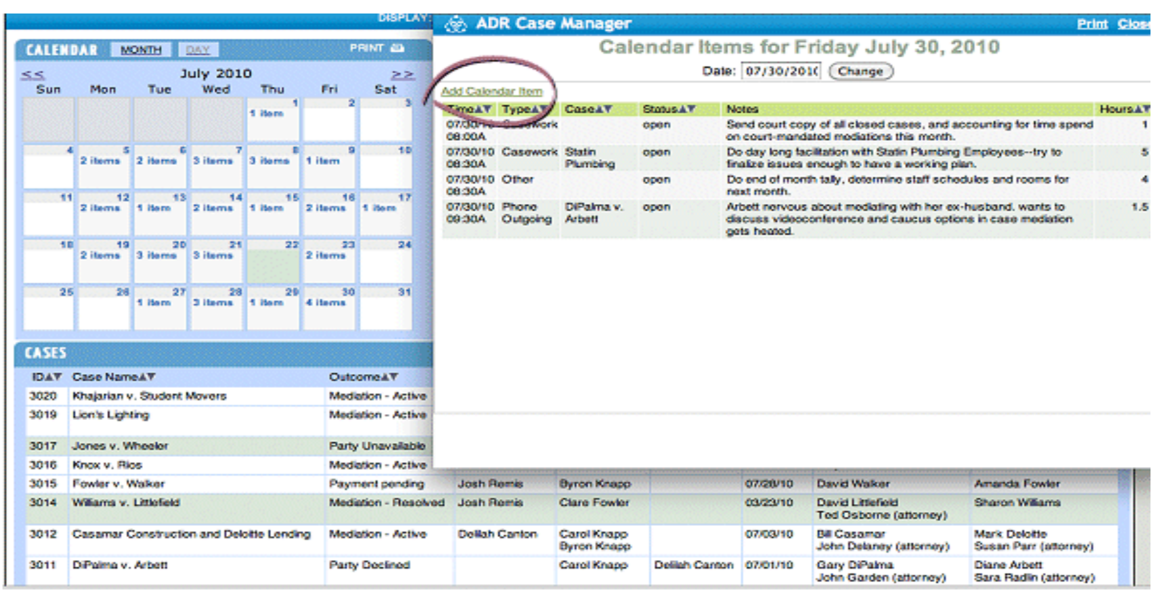
You can view your Monthly or Daily Calendar, create a printable version of your calendar, and easily skip backward or forward by month.

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.

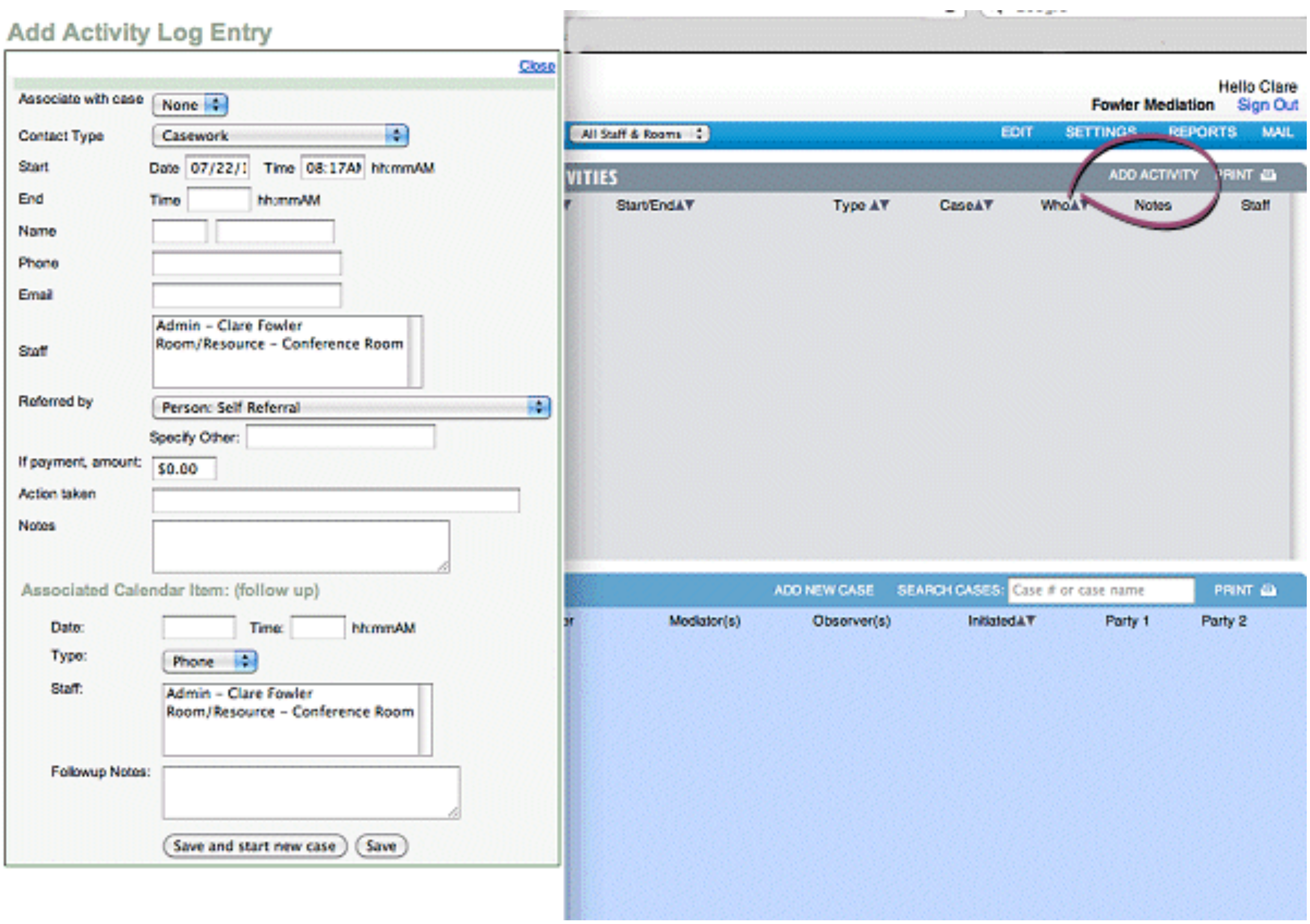


Activities

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.



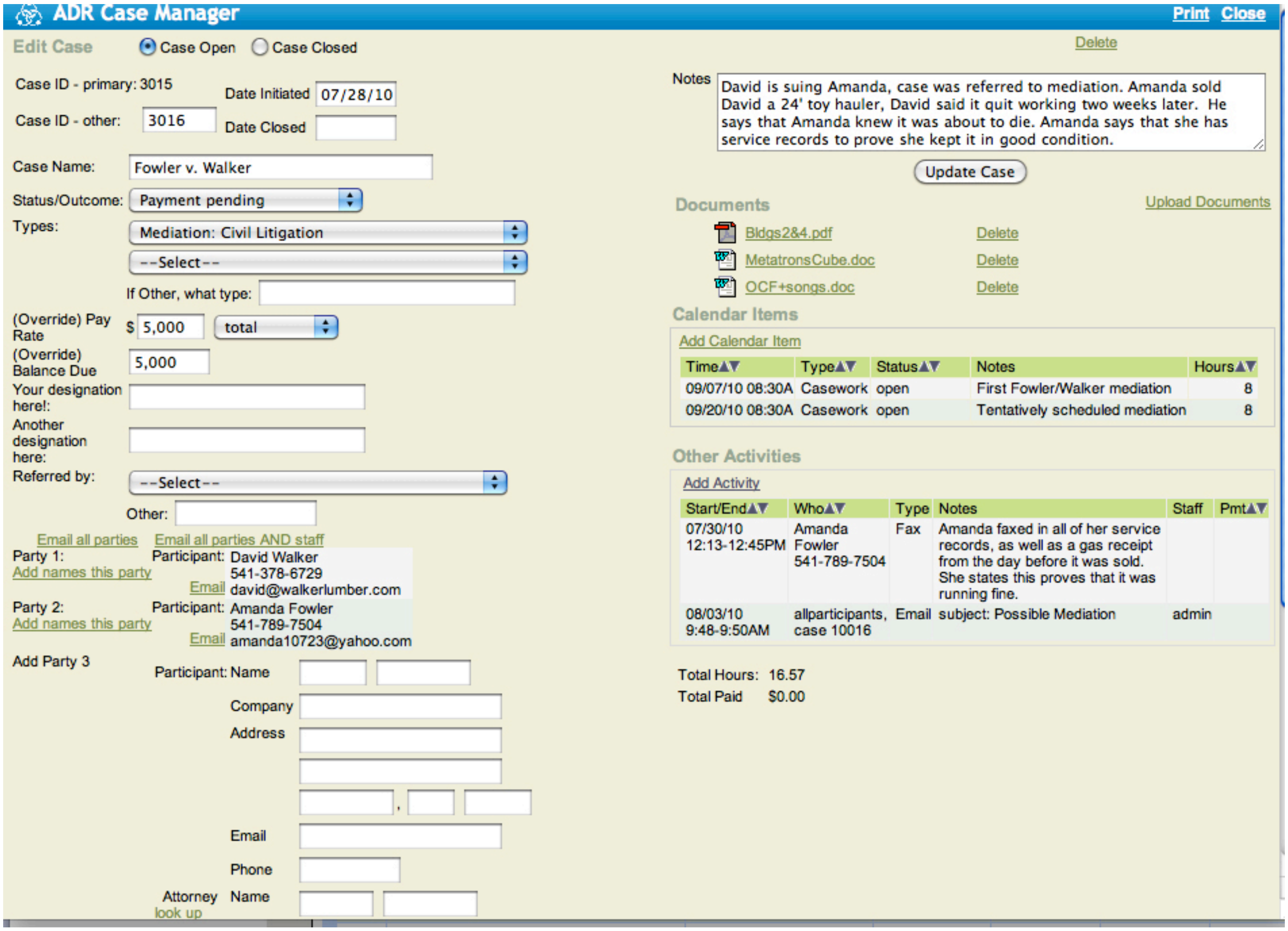
Activities Hints

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

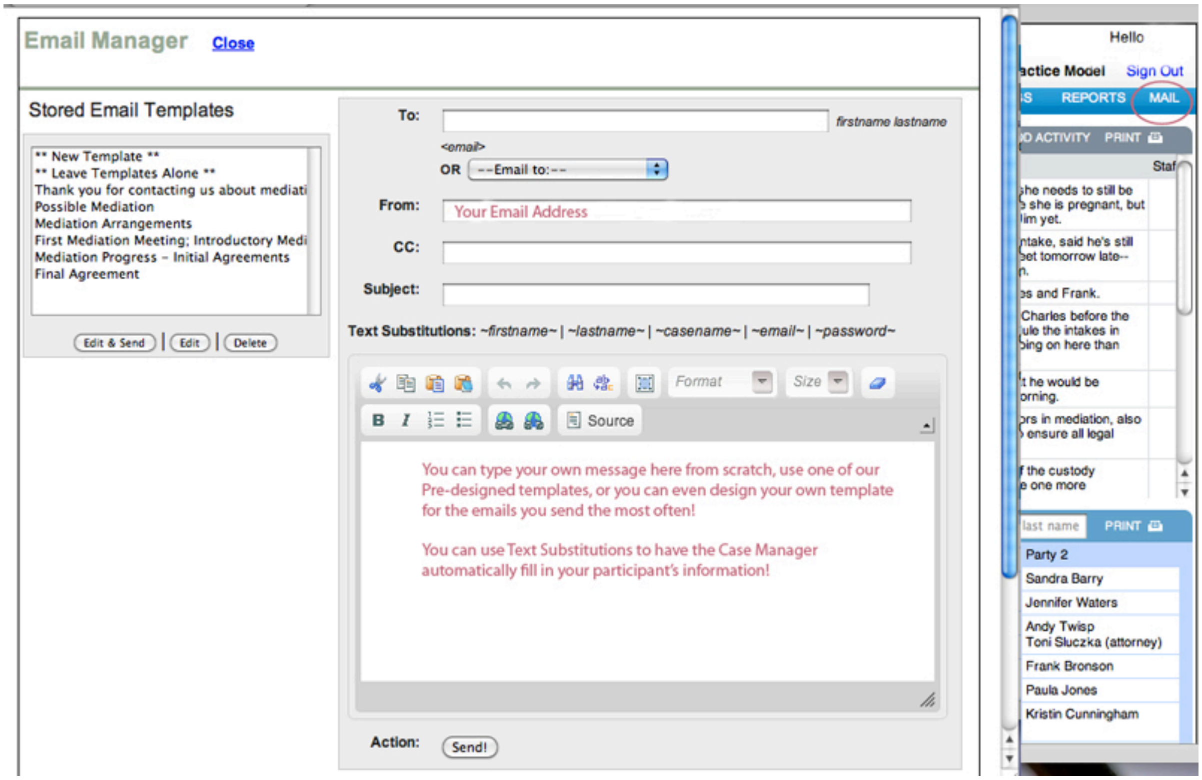


The Case manager provides a way for you to keep track of money due.
Under EDIT>Case Type, you can set the Pay Rate for types of cases. This is helpful IF you have a standard pay rate.

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 predesigned 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.

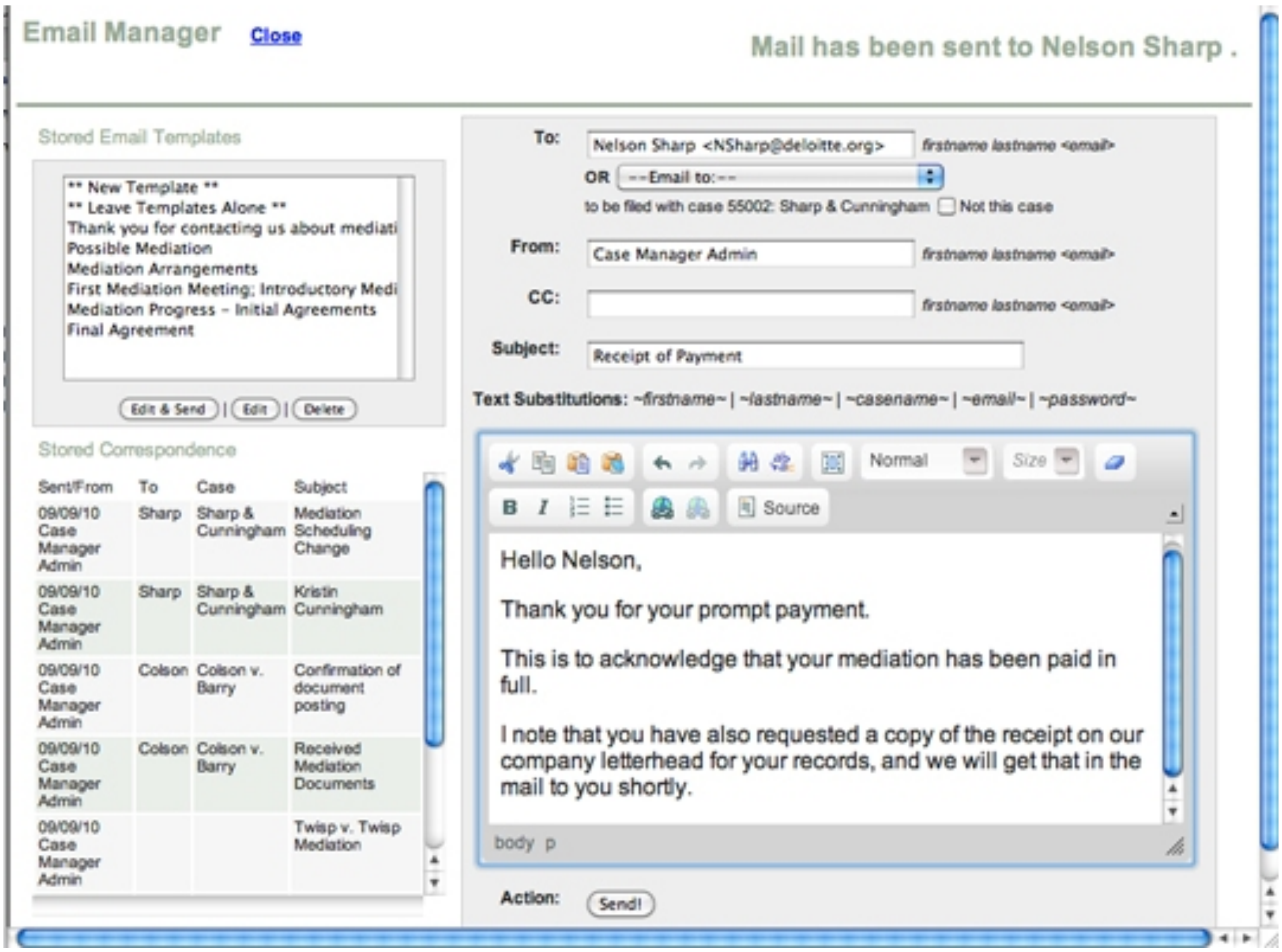
The email will automatically be sent from the person that is logged in the Case Manager.

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.



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.