7. Understand the need for appropriate intake procedures and the factors that make thorough screening essential in elder mediation.

Commentary
Intake is especially important in elder mediation. Intake begins with helping the participants understand elder mediation and decide whether the process meets their needs. The intake process includes screening for elder abuse and capacity issues to ensure safety and the ability to participate fully as discussed in the prior objective and commentary. A goal of intake is to identify and address any physical limitations and determine necessary accommodations, which may include setting an optimal time and place for and length of the mediation session. Pre-mediation process also includes determination of who will be present at the mediation and exploration of roles that individuals may play in the mediation process. At this stage, it is important to consider how to include the voice or values of the older person to the greatest extent possible, particularly when there are cognitive deficits or when the older person is not present. Consideration should also be given as to whether it is appropriate to meet without the older adult.

In some situations, there may be a need for in-person meetings as well as telephonic or electronic communication. In some models of mediation, the pre-mediation process is also a time to begin to understand the dynamics and culture of the parties; to build participants’ rapport and comfort with the process and possibly with the mediator; to assist participants to prepare for the session, and, especially in multi-party cases, to plan the structure of the mediation process.

Core elder mediation training should discuss the role of the mediator in the pre-mediation and intake process. In many programs or cases, support staff or intake specialists make an initial determination of appropriateness. Elder mediation core training in these situations should provide the mediator with an understanding of the importance of this stage and its goals. The mediator should understand the limits and parameters of the initial screening process, the need for training of support personnel, and the mediator’s responsibility to ensure continued appropriateness of the process throughout the mediation. The committee recommends that programs that provide elder mediation training for their own mediators include their intake personnel in the training as well.

Some programs include mediators in the intake process as a matter of policy or need. The committee recommends that training for mediators in such programs, and for mediators in private practice, include discussions of the benefits and pitfalls of mediator involvement in intake, as well as skills training in the pre-mediation process. Best practice includes trainee practice of pre-mediation conversations.

In either case, the training should include a discussion of situations in which a mediator is not competent to handle a particular case—because of lack of needed expertise, or because the mediator does not feel able to ensure the safety and integrity of the process—and of appropriate steps to take in that situation, whether it is identified during the intake process or later in the mediation.