

**Cloud-Based  
Caseload Management  
For Special Education  
Dispute Resolution Programs**


*with*

**Dr. Clare Fowler**

# Case Management System Qualities

- **Reliable** – 24/7 up-time, back-ups & updates
- **Scalable** - no limits on fields, cases, people ...
- **Customizable** – edit, add, delete all fields
- **Confidential** – the right people see the right info
- **Secure** – AWS, ID/PW, https encryption

# Integrated Interface



Hello Mediate.com  
[Feedback](#) [Help](#)  
**Model Company** [Sign Out](#)

DISPLAY: All Staff & Rooms

EDIT SETTINGS REPORTS MAIL

**CALENDAR** MONTH DAY ADD ITEM

March 2012

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1 item	1 item	
				8 item	5 items	10
				15 items	16 items	17
				22 items	23 items	24
				29 items	30 items	31

**ACTIVITIES** [ << Next >> ] ADD ACTIVITY | FILTER | SELECT

Date	Type	Case Name	Who	Notes
02/14/12	Email Manager Correspondence	Knox v. Rios	all Participant this case	Subject: Meeting Remind
02/15/12	Email Manager Correspondence	Casamar Construction and Deloitte Lending	staff this case	Subject: working agreee doc, Casamar case
02/15/12	Email Manager Correspondence	Casamar Construction and Deloitte Lending	staff this case	Subject: agreement doc version 2 - Casamar cas
02/22/12	Payment	Jones Foreclosure		
07/03/10	Phone Outgoing	Casamar Construction and Deloitte Lending		payment requested
07/25/10	Phone Incoming	DPalma v. Arbett	Joan	discovery document discussion
07/27/10		DPalma v. Arbett		Payment received

**CASES** -1- ADD NEW CASE | FILTER | SELECT FIELDS | EXPORT

ID	Open/Closed	Ath	Name of Case	Work Group	Status	Mediator(s)	Closed	Party 1	Party 2	Additional Parties	Referral Source	Next Action
3019	Open		Lion's Lighting	Con						Paula Wills, Toby Radin, Sara Gonzalez, Alberto	Self Referral	
3017	Closed		Jones v. Wheeler									
3016	Open		Knox v. Rios									
3015	Open		Fowler v. Walker									
3014	Closed		Williams v. Littlefield									

**Calendar Items for Wednesday March 21, 2012**

Time	Type	Case	Notes
02:15A	Phone Outgoing	Fowler v. Walker	discuss as prepped
05:00P	Email (outside CM)		Send Joanna the front counter evaluation form
06:00P	Casework		staff training
07:00P	Phone Outgoing	DPalma v. Arbett	See how draft agreement is setting with the clients

**Case Information** Case ID - primary: 3015 | CASE ID - other: 3016

First Contact Date: 07/28/10 Date Closed: [ ]

Name of Case: Fowler v. Walker

Work Group: -- Select Work Group --

(Override) Pay Rate: \$ 5.00 --Select--

Date Scheduling Notice Mailed: [ ]

Mediation Report Completed:  Yes (Required)  No

**Contacts**

Email: All | Participants | Attorneys | Advocates | Consultants

Party 1: Add names this party

--Add Participant Already On File--

--Add Attorney Already On File--

--Add Advocate Already On File--

--Add Consultant Already On File--

Participant: David Walker  
541-378-6729  
Email: david@walkerunber.com

Staff Case Developer: Remis, Josh

Email Staff Mediator: Knapp, Byron

Update Case

**Referral Sources**

- Case Status
- Case Types
- Staff Types
- Activity and Calendar Types**
- Person Types
- Global Settings
- Custom Case Fields
- Custom Party Fields
- Custom Staff Fields
- Custom Calendar Fields
- Custom Activity Fields
- Case Field Access

# Case Management System Hubs

- Cases
- Activities
- Calendar
- Email
- Reports

# Case Record Sections

- Case Data
- Contacts - Staff
- Notes
- Downloaded Files
- Calendar Entries
- Activities

# Sample Case Record

Resourceful Internet Solutions, Inc. [US] [https://www.caseloadmanager.com/cases/dsp\\_caseedit.cfm?id=10027&returnto=index%2Ecfm%3Fmessage%3DCase%2520updated](https://www.caseloadmanager.com/cases/dsp_caseedit.cfm?id=10027&returnto=index%2Ecfm%3Fmessage%3DCase%2520updated)

Caseload Manager Close

Edit Case
 Case Open
  Case Closed
  Needs attention
  NOW!!
 Update Case
[DELETE THIS CASE]
[Export This Case]
[Add MeetingSpace]

**Case Information** Case ID - primary: 204 | CASE ID - other: 2510

Date Initiated: 11/01/12  Date Closed:

Case Name: Zoom v. Strong Tires

(Override) Pay Rate: \$ 200.00 --NA or get rate info from Case Type--

(Override) Balance Due: \$ 400.00

Referred by: District Attorney

Other:

Court-Mandated?: Yes

Children Involved?: No

Co-Mediation?: No

Prior Grievance?:  Y

Consultation Paid?:  Yes (Required)  No

Date Order Received?: 11/10/12

Update Case

**Details**

Notes: (Please initial and date notes)

12/06/10 EP - Kent "Zoom", a racecar driver, says that his sponsor, Strong Tires, was allowed to use his image for an exclusive set of promotional materials. Zoom says that Strong Tires used his image in an advertisement in a club, which made it look as if he was supporting the club. Strong says that it can not control who decides to take their materials and place them in an establishment.

Status: Outcome pending

Waiting For: (If anything is entered here, this case will not show up on the "cases needing assignment" report:)

Some participants do not have email addresses; send snail mail forms

Types: --Select--

If Other, what type:

Update Case

**Contacts**

Email: [All](#) | [Adjustors](#) | [Participants](#) | [Attorneys](#)

**Party 1:** [Add names this party](#)

Participant: Kent Brody  
 541-345-1679  
[Email info@zoomdriving.org](mailto:info@zoomdriving.org)

Attorney: Cole Brody  
 541-345-1679  
[Email cole@zoomdriving.org](mailto:cole@zoomdriving.org)

--Add Adjustor Already On File--  
 --Add Participant Already On File--  
 --Add Attorney Already On File--

**Party 2:** [Add names this party](#)

Participant: Cheryl Ladd  
 541-687-9423  
[Email counsel@strongtires.com](mailto:counsel@strongtires.com)

Attorney: Karl Meyer  
 503-346-7082  
[Email kmeyer@eugene.or.gov](mailto:kmeyer@eugene.or.gov)

Attorney: Mary Lowry  
 503-782-9564  
[Email mlowry@chickenshack.org](mailto:mlowry@chickenshack.org)

--Add Adjustor Already On File--  
 --Add Participant Already On File--  
 --Add Attorney Already On File--

**Party 3:** [Add names this party](#)

--Add Adjustor Already On File--

**Documents**

[Upload Documents](#)


Document Name	Delete
cases1287_tab.txt	Delete
Strong completed intake form.doc	Delete
Zoom completed intake form.doc	Delete

**Calendar Items**

[Add Calendar Item](#)

Time	Type	Notes	Hours
11/01/11 02:30P	Meeting	Initial opening statement to be provided. Zoom asked if we could meet at racetrack.	4
11/02/11 02:00P	Casework	Call Strong Tires, ask them to send over a copy of the contract.	1
11/12/11 10:30A	Casework	Contact Zoom, ask him to send over a copy of the contract as well as examples of promotional materials.	1
11/16/11 10:00A	Casework	Intake scheduled with Strong Tires.	2
05/16/13 02:00P	Casework	Intake scheduled with Zoom.	2
06/17/13 11:45A	Videoconference	Zoom is on road. I have videoconference scheduled w Strong	3

# Calendar & Email Reminders


Hello Admin Staff At  
Feedback Help  
Panel Model Sign Out

DISPLAY: All Staff & Rooms      EDIT    SETTINGS    REPORTS    MAIL

**ACTIVITIES**      << Next >>    ADD ACTIVITY | FILTER | SELECT FIELDS | EXPORT

**CASES**      ~1~    ADD NEW CASE | FILTER | SELECT FIELDS | EXPORT

**CALENDAR**      MONTH    DAY    ADD ITEM

<<      June 2013      >>

Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	1 Item	1 Item	1 Item			
9						
16	1 Item		1 Item	1 Item	2 Items	1 Item
23					1 Item	2 Items
30						

>

**Calendar Items for Friday June 21, 2013**

Time	Type	Case	Notes
10:00A	Phone Outgoing	Zoom v. Strong Tires	Call Strong Tires, request a ha on promotion while in mediator
02:00P	Casework	Demorah Cypik v. Chicken Shack	Intake with Alex Bender scheduled. He will call in.

# Email Center: Templates, Insertions & Log

## Email Manager

**Edit Template then Send Email**

### Stored Email Templates

**\*\* New Template \*\***  
**\*\* Leave Templates Alone \*\***  
 Final Agreement  
 First Mediation Meeting; Introductory Mediat  
 Information Confirmation  
 Mediation Arrangements  
 Mediation Progress - Initial Agreements  
**Participant Confirmation**  
 Possible Mediation  
 Staff Log-in

| 
  |

### Stored Correspondence

Sent/From	To	Case	Subject
11/02/11 Admin Staff At Mediate.com	Clare Fowler		test email
11/02/11 Admin Staff At Mediate.com	all parties this case	Zoom v. Strong Tires	Participant Confirmation
11/02/11 Panel Model	Staff this case		Meeting Reminder - Panel Model
10/26/11 Panel Model	Parties this case	Mandell v. Rand.	Meeting Reminder - Panel Model
10/19/11 Panel Model	Staff this case	Schoemaker Case	Meeting Reminder - Panel Model
09/30/11 Panel Model	Staff this case		Meeting Reminder - Panel Model
08/31/11	all parties	Zoom v.	Participant

**To:**  firstname lastname <email>  
OR

**From:** Admin Staff At Mediate.com <admin@me> firstname lastname <email>

**CC:**  firstname lastname <email>

**Subject:**

**Text Substitutions:** ~firstname~ | ~lastname~ | ~casename~ | ~email~ | ~password~  
 ~streetaddress~ | ~date~ | ~caseid~ | ~othercaseid~ | ~allrecipients~ | ~uploadurl~

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**B** *I* ☰ ☰ 🌐 🌐 📄 Source

~firstname~ ~lastname~  
 ~streetaddress~

~date~

Dear ~firstname~,

This email confirms your participation in the upcoming mediation:  
 ~casename~.

We will be sending you information shortly including:

**Action:**





# Meta Data Reporting

Report Period: 01/01/2012 Thru 12/31/2013

Report Date: 06/13/2013

	Totals	Mediation Center	Center	Center	West	Mediation Center	Resolution Center
Total Case Volume	4857	923	1191	1228	215	935	365
Total New Cases	4339	788	1098	1144	191	780	338

## CASE VOLUME BY CASE TYPE

PARENTING PLAN	3107	596	556	865	144	701	245
FAMILY-NON PP	105	8	17	51	4	17	8
GENERAL/COMMUNITY	466	118	103	132	20	85	8
CHILD WELFARE	1096	175	491	165	32	131	102
JUVENILE	51	18	16	8	6	1	2
ADULT CRIMINAL	1	0	0	1	0	0	0
Unknown	31	8	8	6	9	0	0

## NEW CASES BY REFERRAL SOURCE

Attorney	927	21%	285	36%	72	7%	336	29%	53	28%	147	19%	34	10%
Court	2562	59%	400	51%	878	80%	395	35%	81	42%	549	70%	259	77%
Gov. Agency/Org	227	5%	54	7%	52	5%	76	7%	17	9%	19	2%	9	3%
School	9	0%	2	0%	0	0%	3	0%	2	1%	2	0%	0	0%
Self/Family/Friend	550	13%	46	6%	95	9%	282	25%	32	17%	62	8%	33	10%
Unknown	64	1%	1	0%	1	0%	52	5%	6	3%	1	0%	3	1%

## CASE DISPOSITION

Cases Mediated	2729		608		791		521		99		465		245	
Resolution	2193	80%	456	75%	684	86%	423	81%	69	70%	358	77%	203	83%

# Training and Support

## Welcome to the Caseload Manager Support Center



Quickstart Tour



Help Topics



Recent Updates

