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

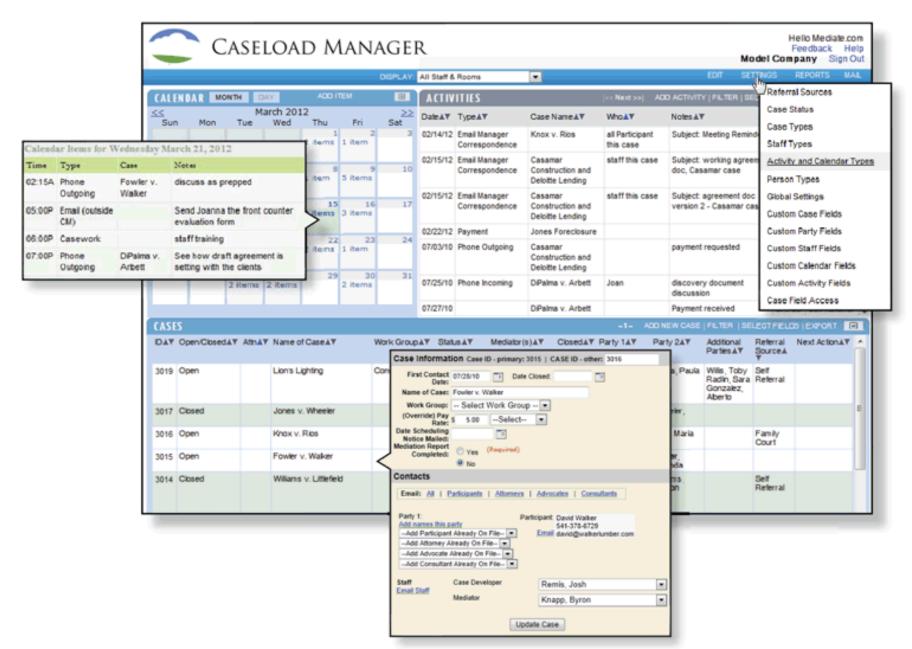
with

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



## Case Management System Hubs

- Cases
- Activities
- > Calendar
- > Email
- Reports

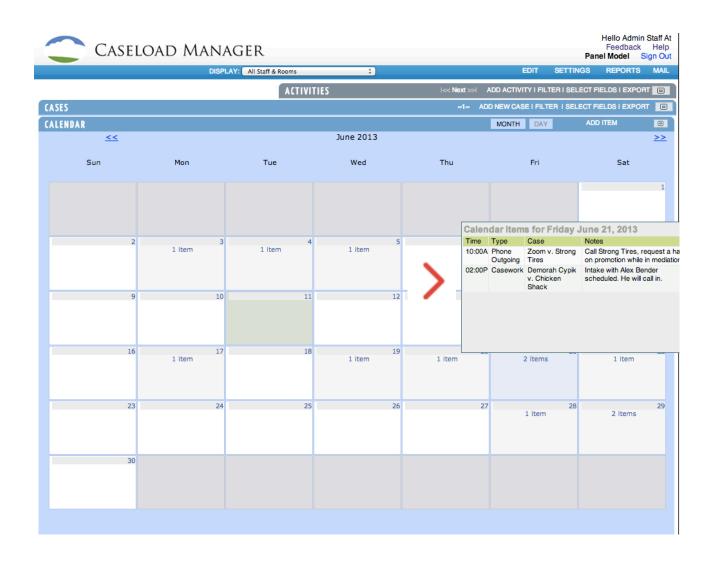
## **Case Record Sections**

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

# Sample Case Record

Resourceful Internet Solutions, Inc. [US] https://www.caseloadmanager.com/cases/dsp_caseedi	t.cfm?id=10027&returnto=index%2Ecfm%3Fmessage%3DCase%2520updated	
Caseload Manager	<u>C</u> I	lose
Edit Case Open Case Closed Needs attention NOW! Update Case [DELET	E THIS CASE ] [Export This Case] [Add MeetingSpace]	
Case Information Case ID - primary: 204   CASE ID - other: 2510	Details	
Date Initiated: 11/01/12 Date Closed:  Case Name: Zoom v. Strong Tires  (Override) Pay Rate: \$ 200.0NA or get rate info from Case Type ‡  (Override) Balance Due: \$ 400.0(  Referred by: District Attorney  Other:  Court-Mandated?: Yes \$  Children Involved?: No \$  Prior Grievance?: Yes (Required)  No  Date Order Received?: 11/10/12	Notes: (Please inital 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	
Update Case	Documents	
Contacts	Upload Documents Document Name	
Email: All   Adjustors   Participants   Attorneys	acases 1287 tab.bxt Delete	
Party 1: Participant: Kent Brody	Strong completed intake form.doc Delete	
Add names this party 541-345-1679	Zoom completed intake form.doc Delete	
Add Adjustor Already On File Add Participant Already On File  Add Participant Already On File   541-345-1679	Calendar Items	
Add Attorney Already On File ‡	Add Calendar Item    Time▲▼ Type▲▼ Notes Hours.	ΔV
Party 2: Participant: Cheryl Ladd	11/01/11 Meeting Initial opening statement to be provided. Zoom asked if we could meet at racetrack.  02:30P	4
Add names this party 541-687-9423	11/02/11 Casework Call Strong Tires, ask them to send over a copy of the contract. 02:00P	1
	11/12/11 Casework Contact Zoom, ask him to send over a copy of the contract as well as examples of	1
Add Participant Already On File   Attorney: Karl Meyer 503-346-7082 Emili kmeyer@purgeere or gov	11/12/11 Casework Contact Zoom, ask him to send over a copy of the contract as well as examples of promotional materials.	
Add Participant Already On File Add Attorney Already On File  Add Attorney Already On File	10:30A promotional materials.  11/16/11 Casework Intake scheduled with Strong Tires.  10:00A	2
Add Participant Already On File Add Attorney Already On File Add Attorney Already On File  Attorney: Karl Meyer  503-346-7082  Email kmeyer@euegene.or.gov  Attorney: Mary Lowry	10:30A promotional materials.  11/16/11 Casework Intake scheduled with Strong Tires.	2

## Calendar & Email Reminders



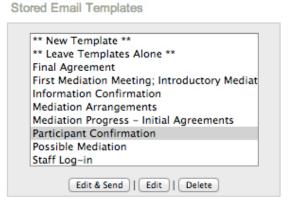
## Email Center: Templates, Insertions & Log



Close

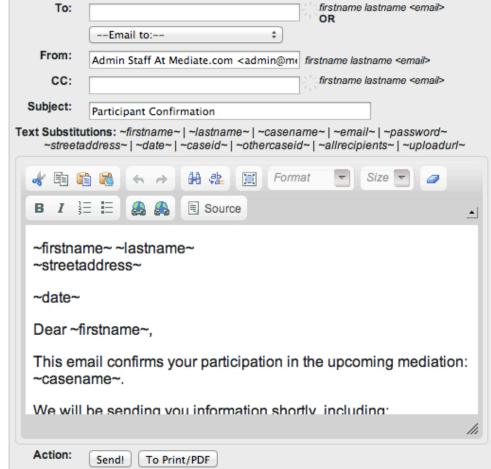
#### **Email Manager**

#### Edit Template then Send Email



#### Stored Correspondence

Sent/From	То	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



## Real Time Reporting

#### I.UTILIZATION OF DISPUTE RESOLUTION SERVICES (DRS)

	· · · · · · · · · · · · · · · · · · ·	
1.	Information and referral inquiries	39
2.	New mediation cases opened	1401
3.	Mediation cases open at the <i>beginning of reporting period</i>	144
4.	Total mediation cases worked on during reporting period	1420
5.	New facilitation cases opened	50
6.	Facilitation cases open at the beginning of reporting period	42
7.	Total facilitation cases worked on during reporting period	65
	Total mediation and facilitation cases worked on during reporting period	1485

#### II. REFERRAL SOURCES FOR NEW MEDIATION AND FACILITATION REQUESTS

1.	Self referral, word of mouth, former client	196	11.8%
2.	District attorney	0	0.0%
3.	Juvenile justice	20	1.2%
4.	Adult justice	1	0.1%
5.	Law enforcement	21	1.3%
6.	Code enforcement	4	0.2%
7.	Small claims court	0	0.0%
8.	Other courts	1	0.1%
9.	Legal aid	3	0.2%
10.	Private practitioner (Mediator, Attorney, Counselor)	1	0.1%
11.	Manufactured communities resource center	0	0.0%
12.	Foreclosure resolution conference	138	8.3%
13.	Other housing agency	9	0.5%
14.	Government agency	0	0.0%
15.	Social services	10	0.6%
16.	Schools	1062	64.1%
17.	Advertising/media coverage/internet	22	1.3%
18.	Other (specify)	0	0.0%
19.	Unknown (no referral source indicated)	133	8.0%
	Total	1621	

#### **III. DRS & CASE TYPE & DISPOSITION**

		DRS provided	Mediation/ resolved	Mediation/ not resolved	Pending	Inappropriate	Party unavailable	Party declined	TOTAL	%
1	ARBITRATION									
1.1	Arbitration	0	0	0	0	0	0	0	0	0.0%
1.2	Med-Arb	0	0	0	0	0	0	0	0	0.0%
	Aubituation Tatal.	^	^	^	^	^	^	^	^	0.00/

# Meta Data Reporting

Report Period: 01/01/2012 Thru 12/31/2013 Report Date: 06/13/2013

		200												
	Total	S	Mediation Center		Center		Center		West		Mediation Center		Center	
Total Case Volume	4	857		923	1	191	1228		215		935		365	
Total New Cases	4	339		788	1	1098		1144		191		780	338	
CASE VOLUME BY CASE	TYPE													
PARENTING PLAN	3	107		596		556	1	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	10	096		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 REFERRA	AL SOU	RCE												
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	2	729		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

