

# Online Case Management & Dispute Resolution Communication



with Jim Melamed and Clare Fowler

# Contextual Issues

- Dramatic hardware & software cost savings
- Geographic and temporal access - telecommuting
- We are all “online dispute resolvers
- Dispute resolution as “choreography of communication”
- Asynchrony and modalities of communication
- An official record
- Confidentiality, security and reliability
- the digital divide?

# Case Management

## Easy-to-use Integrated Interface

Manage cases, contacts, calendar, email and activities from single Interface

Mediate.com Case Manager Hello Admin Staff At  
[Feedback](#) [Help](#)  
[Panel Model](#) [Sign Out](#)

DISPLAY: All Staff & Rooms EDIT SETTINGS REPORTS MAIL

**CALENDAR** MONTH DAY ADD ITEM

<< April 2011 >>

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1 Item	1 Item 2
1 Item 3	1 Item 4	1 Item 5				
	1 Item 10	2 Items 11			1 Item 14	3 Items 16
		4 Items 18				1 Item 23
1 Item 24			1 Item 26			

**ACTIVITIES** ADD ACTIVITY | FILTER | SELECT FIELDS | EXPORT | PRINT

Date	Start/End	Type	Case	Who	Notes	Staff
04/14/11	2:52PM - 2:52PM	Email Manager Correspondence	210	Scott Baro	Subject: Mediation Arrangements	
04/14/11	2:44PM - 2:46PM	Phone Incoming	210	Scott Baro	call Jacobson's attorney	ep
12/12/10	9:00AM - 9:30AM	Phone Incoming	204	Zoom Brody	Zoom called in saying that Strong Tires was still using his image, and had assumed this would stop while they were in mediation.	ep 3
12/10/10	1:00PM - 1:45PM	Meeting	204	Brady Zoom	Contracts reviewed, ok to conduct intake and schedule mediation.	ep
12/08/10	1:28PM - 1:45PM	Phone Incoming	203		Local district court judge called and said he heard about the Jacobson case, felt that it should be tried, or at least brought into court for a settlement conference. I was surprised at this, but said the parties both desired to keep this matter out of the courts.	jd
12/04/10	1:43PM - 1:43PM	Drop In	204		Contract received from Strong Tires.	
12/03/10	1:41PM - 1:43PM	Drop In	204		Contract received from Zoom.	ep
09/22/10	11:42AM - 12:03PM	Drop In	201	Larrv	Larrv brought in all of his required materials	ii

**CASES** Filter: -- Starting Case #1 -- CLEAR FILTER | ADD NEW CASE | FILTER | SELECT FIELDS | EXPORT | PRINT

ID	Case Name	Status	Case Developer	Mediators(s)	Observer(s)	Initiated	Party 1	Party 2
211	Zoom v. Rand					05/03/11	Shelly Zoom	Peter Rand
210	Baro Custody	Outcome pending				04/14/11	Scott Baro	
206	Mandell v. Rand.	Mediation/not resolved	Admin Staff At Mediate.com	John Douce Jay Kribble	Peggy Rogers	07/12/10	Sharon Mandell	Blythe Rand
205	Blue v. Springfield Apartments		Admin Staff At Mediate.com	Peggy Rogers		07/15/10	Janet Blue	Sharon Brickley
204	Zoom v. Strong Tires	Outcome pending	Admin Staff At Mediate.com	Eric Peterson Peggy Rogers	John Douce John Douce	11/01/10	Kent "Zoom" Brody Cole Brody	Cheryl Ladd Mary Lowry
203	Jacobson Estate	Outcome pending				07/15/10	Vivian Jacobson	Chris Jacobson

# Case Manager Features

- Consolidated case information
- Secure and reliable (Amazon Cloud)
- Each authorized staff, panelist, participant only sees proper information
- Works on any computer and current browser
- Filter, Sort, Export, Print customized reports
- Ongoing updates, support & training included

# Case Manager Features (cont.)

- Fully scalable – any number of cases, staff, fields, panelists, parties, roles, activities, templates, etc.
- Add, edit, delete existing and custom fields
- Integrated calendar, activities, email templates and correspondence log
- Upload or email attached documents
- Participant & attorney document access at document upload center

# Case Record

## Manage Unlimited Cases

Mediate.com Case Manager
Print Close

**Edit Case**

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

**Case Information**

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

Date Initiated:  Date Closed:

Case Name:

(Override) Pay Rate: \$

(Override) Balance Due:

Referred by:

Other:

Restorative Justice?:

3rd case type:

**Mediation 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:

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

Types:

If Other, what type:

**Contacts**

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

Party 1:

[Add names this party](#)

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

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

Party 2:

[Add names this party](#)

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

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

Party 3:

[Add names this party](#)

**Documents**

[Upload Documents](#)

[Strong completed intake form.doc](#)

[Zoom completed intake form.doc](#)

[Delete](#)

[Delete](#)

**Calendar Items**

[Add Calendar Item](#)

Time▲▼	Type▲▼	Notes	Hours▲▼
12/16/10 02:00P	Casework	Intake scheduled with Zoom.	2
12/21/10 10:00A	Phone Outgoing	Call Strong Tires, request a halt on promotion while in mediation.	1
03/10/11 10:30A	Casework	Contact Zoom, ask him to send over a copy of the contract as well as examples of promotional materials.	1
04/01/11	Meeting	Initial opening statement to be provided. Zoom asked if	4

# Case Record (cont.)

View related calendar, activities, documents, email, staff and parties all on single screen.

Update Case

### Contacts

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

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

Participant: Kent "Zoom" Brody  
 541-345-1679  
[info@zoomdriving.org](mailto:info@zoomdriving.org)  
 Attorney: Cole Brody  
 541-345-1679  
[cole@zoomdriving.org](mailto:cole@zoomdriving.org)

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

Participant: Cheryl Ladd  
 541-687-9423  
[counsel@strongtires.com](mailto:counsel@strongtires.com)  
 Attorney: Mary Lowry  
 503-782-9564  
[mlowry@chickenshack.org](mailto:mlowry@chickenshack.org)

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

**Staff**

Case Developer	<input type="button" value="Mediate.com, Admin Staff At"/>
Mediator	<input type="button" value="Peterson, Eric"/>
Mediator	<input type="button" value="Rogers, Peggy"/>
Add Mediator	<input type="button" value="-- Select --"/>
Observer	<input type="button" value="Douce, John"/>
Observer	<input type="button" value="Douce, John"/>
Add Observer	<input type="button" value="-- Select --"/>

Update Case

**Types:** Mediation: Criminal:Other  
  
 If Other, what type:

Update Case

**Documents**

[Upload Documents](#)

<a href="#">Strong completed intake form.doc</a>	<a href="#">Delete</a>
<a href="#">Zoom completed intake form.doc</a>	<a href="#">Delete</a>

**Calendar Items** [Add Calendar Item](#)

Time	Type	Notes	Hours
12/16/10 02:00P	Casework	Intake scheduled with Zoom.	2
12/21/10 10:00A	Phone Outgoing	Call Strong Tires, request a halt on promotion while in mediation.	1
03/10/11 10:30A	Casework	Contact Zoom, ask him to send over a copy of the contract as well as examples of promotional materials.	1
04/01/11 02:30P	Meeting	Initial opening statement to be provided. Zoom asked if we could meet at racetrack.	4
04/02/11 02:00P	Casework	Call Strong Tires, ask them to send over a copy of the contract.	1
04/16/11 10:00A	Casework	Intake scheduled with Strong Tires.	2
04/19/11 11:45A	Videoconference	Zoom is on road. I have videoconference scheduled w Strong	3

**Other Activities** [Add Activity](#)

Start/End	Who	Type	Notes	Staff	Pmt
09/09/10	Kent "Zoom" Brody	Email Manager Correspondence	Subject: Request additional room for upcoming mediation		
12/12/10 9:00-9:30AM	Zoom Brody	Phone Incoming	Zoom called in saying that Strong Tires was still using his image, and had assumed this would stop while they were in mediation.	ep,3	
12/10/10 1:00-1:45PM	Brady Zoom	Meeting	Contracts reviewed, ok to conduct intake and schedule mediation.	ep,	
12/04/10		Drop In	Contract received from Strong Tires.		
12/03/10 1:41-1:43PM		Drop In	Contract received from Zoom.	ep	

Total Hours: 15.28  
Total Paid \$0.00



# Custom Fields

Create custom fields for cases, people, calendar & activities. Filter & create reports on custom fields.

Customize Case Entry Screen

Mediate.com Case Manager [Print](#) [Close](#)

### Customize Case Entry Screen

Text Prompt	Field Type	# Choices	Required	Text Length (text type only)	Sort Order	Which Side of Page
Restorative Justice?	Pull-down Box	2	<input type="checkbox"/>		10	Left
3rd case type	Text Box		<input type="checkbox"/>	15	20	Left
Intake Fee Paid:	Text Box		<input type="checkbox"/>	10	30	Left
	-- Choose One --		<input type="checkbox"/>		40	Left
	-- Choose One --		<input type="checkbox"/>		50	Left
	-- Choose One --		<input type="checkbox"/>		60	Left
	-- Choose One --		<input type="checkbox"/>		70	Left
	-- Choose One --		<input type="checkbox"/>		80	Left
	-- Choose One --		<input type="checkbox"/>		90	Left
	-- Choose One --		<input type="checkbox"/>		100	Left

Page 1 of 2

Continue



# Export

Export case information, contacts, activities & calendar items in tab delimited format.

The screenshot displays the Mediate.com Case Manager interface. At the top, the header includes the Mediate.com logo, the text "Case Manager", and "Print Close" links. Below the header, there are navigation buttons: "Edit Case", "Update Case", "[ DELETE THIS CASE ]", and a red-bordered button labeled "[Export This Case]".

The main content area is divided into two columns:

- Case Information:** This section contains fields for "Case ID - primary: 3027 | CASE ID - other:", "First Contact Date: 05/16/11", "Date Closed:", "Name of Case: Yasserman and Fowler", "(Override) Pay Rate: \$ 0.00", "Referred by: --Select--", "Other:", "County:", "Next Action:", "Date Scheduling: true", "Notice Mailed:", "Mediation Report Completed: Yes (Required) / No", "Example pull down: - Select -", and "Example Text Box:". An "Update Case" button is located at the bottom of this section.
- Mediation Details:** This section includes a "Notes" field with the text "2/17: called Jessie regarding whether or not there is a deed associated with the property in the Hamptons. It should be possible to get some kind of opinion on the environmental damage caused by their gas leakage and what kind of costs should be associated with the average similar situation.", a "Status" dropdown menu set to "Need Intake Questionnaire", a "Waiting On:" field with the text "intake questionnaire", "Types:" dropdown menus, and "Lender Requirements:" checkboxes for "Mediation Fee-\$300", "Notice of Default (NOD)", "Aff. of Mailing of NOD", and "Agent Contact Form". There is also a "Righteous:" checkbox set to "Yes". An "Update Case" button is at the bottom of this section.

At the bottom of the interface, there is a "Contacts" section with a link for "Email: All | Participants | Attorneys | Advocates | Consultants".

# Calendar Center

Day, month, full-screen, mouse-over views.  
 Schedule meetings, resources, assign staff.

**CALENDAR**
MONTH
DAY

<<
April

Sun	Mon	Tue	Wed	Thu	Fri	Sat
3 1 Item	4 1 Item	5 1 Item				
10	11 1 Item	12 2 Items			1 Item	3 Items
17	18	19 4 Items	20	21	22	23 1 Item
24 1 Item	25	26	27 1 Item	28	29	30

**Calendar Items for Saturday April 16, 2011**



Time	Type	Case	Notes
08:30A	Casework	Jacobson Estate	Contact Vivian Jacobson, 2nd oldest heir. Discuss the mediation process. Verify she is agreeable pending everyone else's agreement.
09:00A	Phone Outgoing	Jackson Architecture v. Larry's Cabinets	Call Jackson Architecture to verify that he has received all of the materials from Larry.
10:00A	Casework	Zoom v. Strong Tires	Intake scheduled with Strong Tires.

12/08/10	1:28PM - 1:45PM	Phone
12/04/10	1:43PM - 1:43PM	Drop I
12/03/10	1:41PM - 1:43PM	Drop I
09/22/10	11:42AM - 12:03PM	Drop I

# Activity Center

Customize activity types.

Track time and export activity reports.

ACTIVITIES							ADD ACTIVITY   FILTER   SELECT FIELDS   EXPORT   PRINT 	
Date▲▼	Start/End▲▼	Type▲▼	Case▲▼	Who▲▼	Notes	Staff		
04/14/11	2:52PM - 2:52PM	Email Manager Correspondence	210	Scott Baro	Subject: Mediation Arrangements			
04/14/11	2:44PM - 2:46PM	Phone Incoming	210	Scott Baro	call Jacobson's attorney	ep		
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12/10/10	1:00PM - 1:45PM	Meeting	204	Brady Zoom	Contracts reviewed, ok to conduct intake and schedule mediation.	ep		
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12/04/10	1:43PM - 1:43PM	Drop In	204		Contract received from Strong Tires.			
12/03/10	1:41PM - 1:43PM	Drop In	204		Contract received from Zoom.	ep		
09/22/10	11:42AM - 12:03PM	Drop In	201	Larrv	Larrv brought in all of his required materials	ii		

# Email Center

Create, edit, send email templates.  
Sent and received emails placed in case record.

**Mediate.com Case Manager** Close

**Email Manager**

**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

Edit & Send | Edit | Delete

**Stored Correspondence**

Sent/From	To	Case	Subject
04/14/11 Admin Staff At Mediate.com	Baro	Baro Custody	Mediation Arrangements
09/09/10 Admin Staff At Mediate.com	Brody	Zoom v. Strong Tires	Request additional room for upcoming mediation

**To:**  firstname lastname <email>  
**OR**  to be filed with case 204: Zoom v. Strong Tires  Not this case

**From:**  firstname lastname <email>

**CC:**  firstname lastname <email>

**Subject:**

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

Normal Size

**B I** Source

Dear ~firstname~,  
  
This is to summarize progress made regarding the case  
~casename~.  
  
In terms of your interests and goals, these are provisionally  
summarized as follows:  
  
In terms of initial specific agreements reached, I offer the  
following list. We can edit and expand this list during our

body p

**Attachments:** [Upload case document](#)

# Workgroups

Workgroups allow administrators to manage multiple programs.



The screenshot shows the 'Work Groups' section of the Mediate.com Case Manager. At the top, there is a search bar with the placeholder text 'Group name or city; staff last name or email' and an 'Update List' button. Below the search bar are three links: 'Add Top Level Work Group', 'Select Fields', and 'Export'. The main content is a table with columns: 'Parents', 'Group Name', 'City', 'Supervisor(s)', and 'Members'. The table lists several work groups, including 'Restorative Justice' and 'Community', with their respective supervisors and members. Each row has a link 'Add Work Group Below This'.

Parents	Group Name	City	Supervisor(s)	Members
	Restorative Justice	3	Byron Knapp Mediate.com Admin 12210	Jim Melamed Clare Fowler Josh Remis Carol Knapp Peggy Shralow Virginia Canton Jay Smith
<a href="#">Add Work Group Below This</a>				
Restorative Justice > <a href="#">Add Work Group Below This</a>	RJ Work Group 1			Carol Knapp Peggy Shralow Virginia Canton Jay Smith
Restorative Justice > RJ Work Group 1 > <a href="#">Add Work Group Below This</a>	RJ 1 Subgroup 1			Peggy Shralow Virginia Canton Carol Testagain
Restorative Justice > <a href="#">Add Work Group Below This</a>	RJ Work Group 2			Jim Melamed Clare Fowler Josh Remis Peggy Shralow Jay Smith
Restorative Justice > RJ Work Group 2 > <a href="#">Add Work Group Below This</a>	RJ 2 Subgroup 1		Clare Fowler	Jim Melamed Josh Remis
<a href="#">Add Work Group Below This</a>	Community		Delliah Canton	Cindy Jones Observer Guest Cindy Jones

# Reporting

- Reporting: Filtering, sorting, exporting of data for display, print or export
- Export into Excel or Crystal Reports
- Workgroups
- Meta-data

# Live Demo



<https://www.mediate.com/Cases>