# 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



# **Case Manager Features**

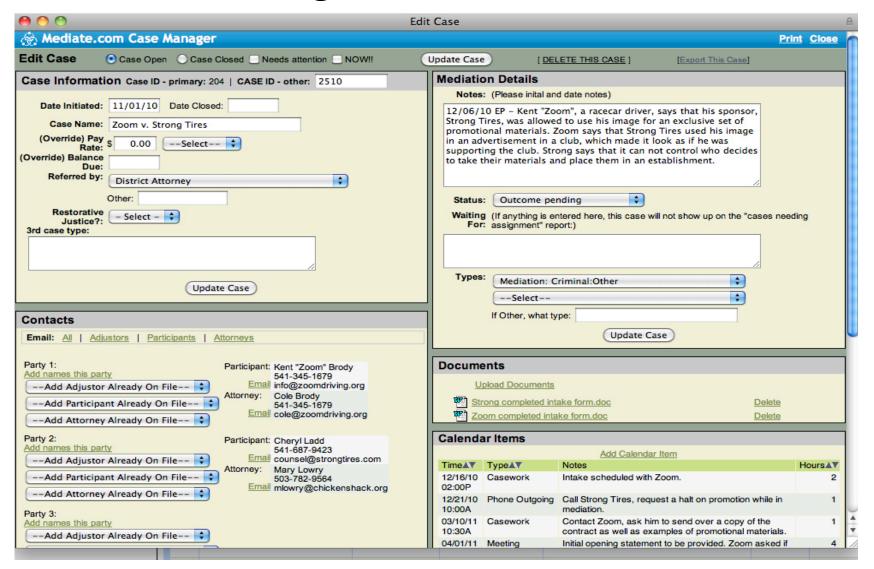
- Consolidated case information
- Secure and reliable (Amazon Cloud)
- Each authorized staff, panelist, participant only sees proper information
- Works on any computer and current browser
- Filter, Sort, Export, Print customized reports
- Ongoing updates, support & training included

## 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

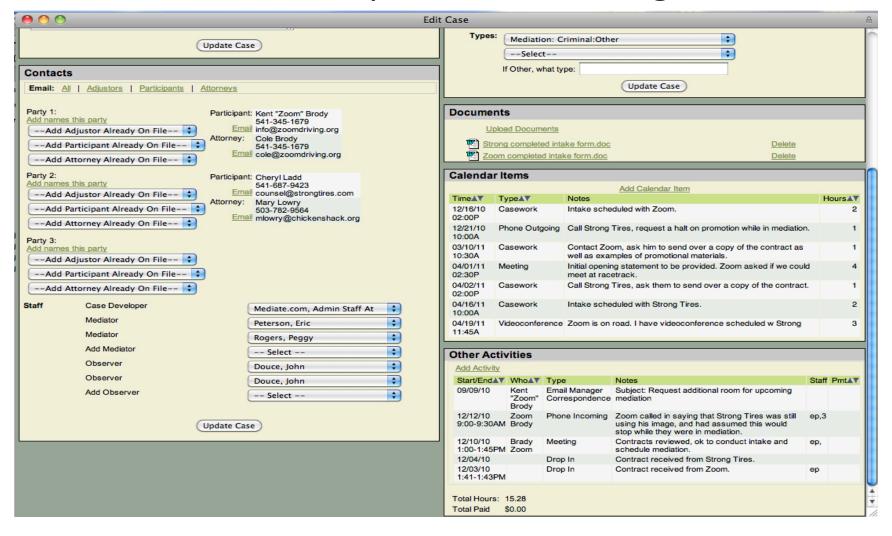
#### **Case Record**

#### Manage Unlimited Cases



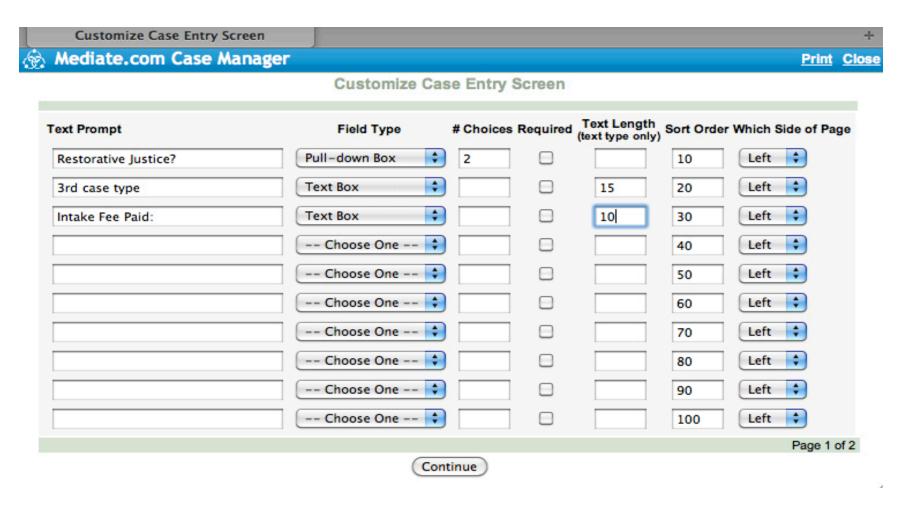
## Case Record (cont.)

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



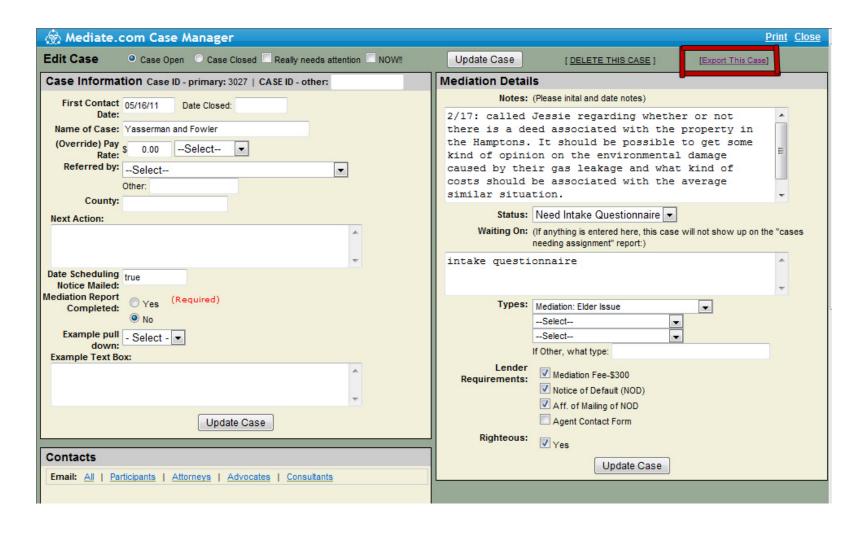
#### **Custom Fields**

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



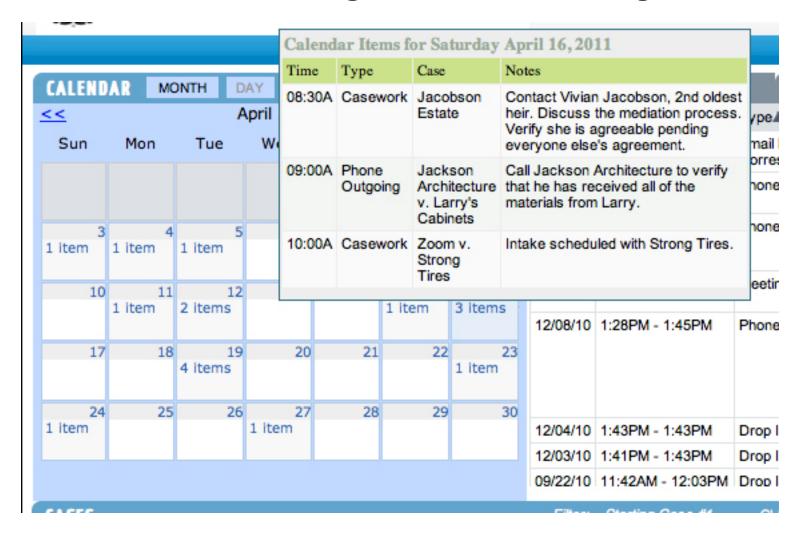
# **Export**

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



#### **Calendar Center**

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



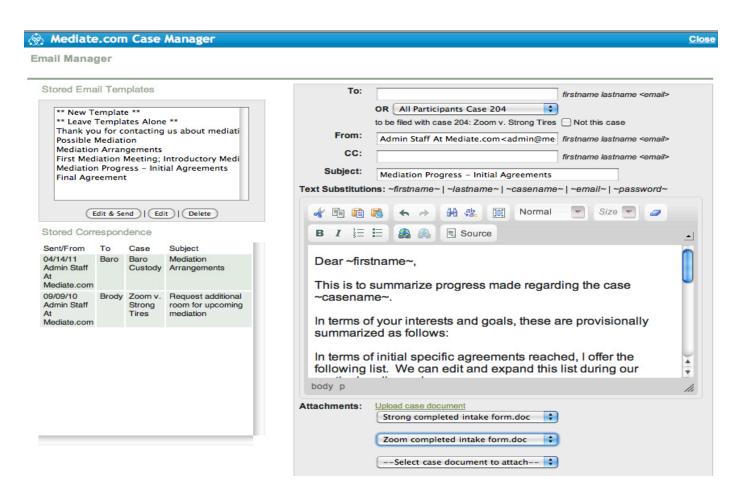
# **Activity Center**

# Customize activity types. Track time and export activity reports.

| Date▲▼   | Start/End▲▼       | Type▲▼                          | Case▲▼ | Who≜▼         | Notes  | Staff |
|----------|-------------------|---------------------------------|--------|---------------|--|-------|
| 04/14/11 | 2:52PM - 2:52PM   | Email Manager<br>Correspondence | 210    | Scott<br>Baro | Subject: Mediation Arrangements  |       |
| 04/14/11 | 2:44PM - 2:46PM   | Phone Incoming                  | 210    | Scott<br>Baro | call Jacobson's attorney   | ер    |
| 12/12/10 | 9:00AM - 9:30AM   | Phone Incoming                  | 204    | Zoom<br>Brody | Zoom called in saying that Strong Tires was<br>still using his image, and had assumed this<br>would stop while they were in mediation.   | ер 3  |
| 12/10/10 | 1:00PM - 1:45PM   | Meeting                         | 204    | Brady<br>Zoom | Contracts reviewed, ok to conduct intake and<br>schedule mediation.  | ер    |
| 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.   | ер    |
| 09/22/10 | 11:42AM - 12:03PM | Drop In                         | 201    | Larry         | Larry brought in all of his required materials   | ii    |

#### **Email Center**

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



# Workgroups

Workgroups allow administrators to manage multiple programs.



# 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