



CASELOAD MANAGERTM



CASELOAD MANAGER

- Caseload Manager is a system that helps you to manage your data in the cloud.
- It is flexible, so it can accommodate a variety of practices, staff, projects, cases, and reporting needs.
- It allows multiple people to log-in and have immediate access to real-time data.
- It allows you to determine how much access you give your staff.
- It allows you to create your own fields and templates.
- You can begin using it quickly, add-on features and fields as you need, and call anytime with questions.

TRAINING OUTLINE

1 Introduction

- Getting Started
- Staff Set-up

2 Configuration

- Settings
- Custom Fields
- Mail Hub
- Reports Hub
- Exporting

3 Optimization

- Surveys
- Billing

4 Advanced Features

- Workgroups
- Automated Follow-ups
- Deadlines



CASELOAD MANAGERTM




INTRODUCTION

Logging-In

- Log-in at <https://www.CaseloadManager.com/NYlogin.cfm>
- UserID and Password sent to you in an email
- When you log-in, you will see the Caseload Manager home screen
- Home screen is arranged in 5 Hubs:
 - Calendar, Activities, Cases, Mail, & Reports

5 Hubs: Calendar, Activities, Cases, Mail, & Reports



CASELOAD MANAGER

Hello Mediate.com

[Feedback](#) [Help](#) [Sign Out](#)

Mediation Center

DISPLAY: All Staff & Rooms

EDIT SETTINGS

REPORTS

MAIL

CALENDAR

MONTH DAY

ADD ITEM

July 2016

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
					1 item	
3	4	5	6	7	8	9
1 item						
10	11	12	13	14	15	16
					1 item	
17	18	19	20	21	22	23
	1 item					
24	25	26	27	28	29	30
	1 item	1 item				
31						
1 item						

ACTIVITIES

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

Date	Start/End	Type	Case ID	Case Name	Who	Notes	Invoice
05/26/16	4:00AM - 4:00AM	Email Manager Correspondence	3076	Angela Deadline	all parties	Subject: Mediation Arrangements	
05/16/16	1:46PM - 1:46PM	Casework	3076	Angela Deadline		testing	
05/16/16	1:44PM - 1:44PM	Agreement Check-in				notes	
03/31/16	11:08AM - 11:08AM	Phone Incoming	3113		Mary DeLeon John Smith	Divorce case	
03/02/16	12:45PM - 12:45PM	Intake	3112		Sue Arbett 510-561-2379 Jerry Dover	Divorce case	
03/02/16	12:34PM - 12:34PM	Intake	3111		Sue Arbett 510-561-2379 Jane Doe John Doe	Divorce case	
03/02/16	11:50AM - 11:50AM	Intake	3110		Sue Arbett 510-561-2379 John Doe	Divorce Case	

CASES

~1~ 2 3 Next | ADD NEW CASE | FILTER | SELECT FIELDS | EXPORT

Getting Started

The best way to use Caseload Manager is to jump in. These links will show you how to get started with the basics:

- [Add a case](#) from the Cases Hub
- [Add an activity](#) from within the Edit Case window
- [Add a calendar item](#) as an activity follow-up, or from within the case
- Closing a case: enter all necessary information, change the Status, enter Date Closed, and check Closed

Expert user tip: whenever you are adding an activity or calendar item related to a case, open the case and then add the item from that window.

Introduction Exercise

- ✓ Add a Case
- ✓ Within that Case, Add an Activity and Calendar Item
- ✓ Close the Case
- ✓ Make a list of custom fields
- ✓ Manage transition ?

The screenshot displays a software interface with three main sections: Documents, Calendar Items, and Other Activities. The 'Documents' section has an 'Upload Documents' link. The 'Calendar Items' section contains a table with one entry: '06/15/16 09:30A Meeting' with 3 hours. The 'Other Activities' section contains a table with one entry: '06/13/16 10:47AM - 11:47AM' with 1 hour, type 'Phone Incoming', and notes 'Case Intake Conducted'. Below the table are summary statistics: Total Hours: 4, Total Paid: \$0.00, Total Sessions: 0, Case Total: \$0.00, and Balance Due: \$0.00. A pink arrow points to the 'Add Calendar Item' link, and another pink arrow points to the 'Add Activity' link.

Documents	
Upload Documents	

Calendar Items	
Add Calendar Item	
Time▲▼	Type▲▼ Notes Hours▲▼ Inv▲▼
06/15/16 09:30A	Meeting 3

Other Activities	
Add Activity	
Date▲▼	Start/End▲▼ Hours Type▲▼ Who▲▼ Notes Staff▲▼ Pmt▲▼ Inv▲▼
06/13/16	10:47AM - 11:47AM 1 Phone Incoming all parties Case Intake Conducted

Total Hours: 4
Total Paid: \$0.00
Total Sessions: 0
Case Total: \$0.00
Balance Due: \$0.00

Workflow

1. Add a Case
2. Assign Staff
3. Add an Activity (e.g. Intake)
4. Add a Calendar Item (e.g. Mediation Session)
5. Send any Confirming or Closing Emails
6. Close Case

The screenshot shows the 'Caseload Manager' application window. The interface is divided into several sections:

- Case Information:** Contains fields for Case ID, Date Initiated (06/13/16), Date Closed, Case Name (New Case Name), (Override) Pay Rate (\$0.00), (Override) Balance Due (\$0.00), and Referred by (dropdown). A purple '1)' is next to the 'Edit Case' button, and a purple '6)' is next to the 'Update Case' button.
- Contacts:** Lists participants (Party 1, Party 2, Party 3) with options to add names or participants on file. A purple '5)' is next to the 'Add names this party' link.
- Staff:** Lists staff roles (Mediator, Add Case Developer, Add Mediator, Add Observer) with dropdown menus. A purple '2)' is next to the 'Add Case Developer' dropdown, and a purple '3)' is next to the 'Add Mediator' dropdown.
- Details:** Contains a Notes field, Status (Active), Waiting For field, and Types (Mediation: Other). A purple '4)' is next to the 'Update Case' button.
- Documents:** Includes an 'Upload Documents' button.
- Calendar Items:** Shows a table with columns for Time, Type, and Notes. A sample entry is '06/15/16 09:30A Meeting'. A purple '4)' is next to the 'Add Calendar Item' button.
- Other Activities:** Includes a table with columns for Date, Start/End, Hours, Type, and Who. A sample entry is '06/13/16 10:47AM - 11:47AM 1 Phone Incoming all parties'. A purple '4)' is next to the 'Add Activity' button.

Summary statistics at the bottom right:

Total Hours:	4
Total Paid:	\$0.00
Total Sessions:	0
Case Total:	\$0.00
Balance Due:	\$0.00



CASELOAD MANAGERTM



STAFF SET-UP

Add Staff

- [Staff Types](#) Begin in the SETTINGS menu, creating your staff types, such as Admin, Mediator, and Intern
- Staff Access Levels Next determine what access levels you want available for your staff—such as Full Access for Admins, Limited Access for Mediators, and Read-only Access for Interns in SETTINGS>Staff Access Levels
- [Add Staff](#) Now go to the EDIT menu, click Add, and begin adding in your staff. Create random passwords, at least 6 characters long.

Expert user tip: Make sure to add staff initials—that is how you can track staff activity. Add their access level to determine how much they can do in the system. Finally, add notes to the Confidential Notes box that you want only the admins to be able to read.

Advanced Staff Features

- [Workgroups](#) You can assign staff to a workgroup in their record, which we will cover in the workgroups section, if you have added-on this feature.
- [Billing](#): The default billing set-up is that the amount of time your staff spends on a case will be charged to that case. The total amount of time, multiplied by the rate, will provide you with a Balance Due on your Case screen.

Expert user tip: Staff Display: You can view what your staff are seeing and doing by changing the display at the top of the screen.

Staff Invitation: Invite staff to begin using Caseload Manager with the template in your Email Hub.

Email Manager

Edit Template then Send Email

Stored Email Templates

- ** New Template **
- ** Leave Templates Alone **
- Final Agreement
- First Mediation Meeting; Introductory Mediation
- Mediation Arrangements
- Mediation Progress - Initial Agreements
- Possible Mediation
- Sending Staff Log-in Information**
- Thank you for contacting us about mediation
- Welcome to Caseload Manager: Configuratio

Stored Correspondence

To: firstname lastname <email>
OR
From: firstname lastname <email>
CC: firstname lastname <email>
[+ more CCs](#)

Subject: Sending Staff Log-in Information

Text Substitutions: ~firstname~ | ~lastname~ | ~casename~ | [+ more](#)

Action:

Body:

Dear ~firstname~,

You are now able to log into Caseload Manager.

To access Caseload Manager, go to
<https://www.CaseloadManager.com/Cases>

Enter your UserID: ~email~
Enter your password: ~password~

You will be able to see all of your information

Staff Exercise

- ✓ Add a Case
- ✓ Within that Case, Add an Activity and Calendar Item

Documents									
Upload Documents									

Calendar Items						
Add Calendar Item						
Time▲▼	Type▲▼	Notes	Hours▲▼	Inv▲▼		
06/15/16 09:30A	Meeting		3			

Other Activities								
Add Activity								
Date▲▼	Start/End▲▼	Hours	Type▲▼	Who▲▼	Notes	Staff▲▼	Pmt▲▼	Inv▲▼
06/13/16	10:47AM - 11:47AM	1	Phone Incoming	all parties	Case Intake Conducted			
Total Hours:		4						
Total Paid		\$0.00						
Total Sessions:		0						
Case Total:		\$0.00						
Balance Due:		\$0.00						



CASELOAD MANAGERTM



CONFIGURATION

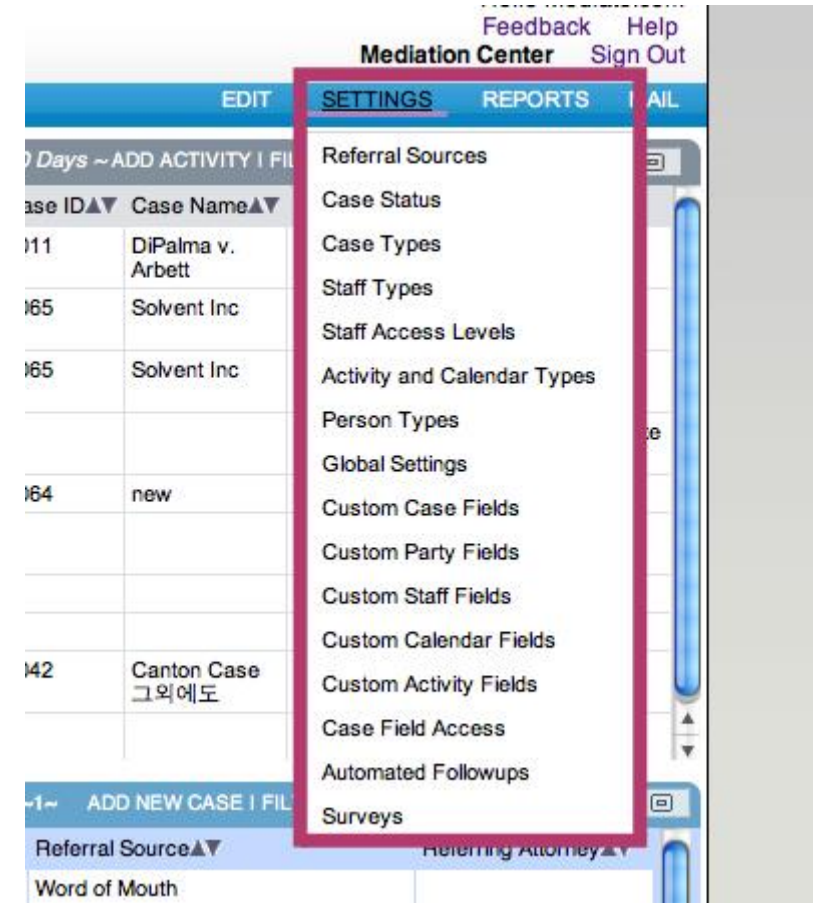
SETTINGS

- It is important to customize your SETTINGS menu early, before you add too much information.
- The top half contains the fields that came with your Caseload Manager (Referral Sources, Case Types, etc.). Take time to add, delete, and edit these fields.
- The second half of the SETTINGS menu allows to add your own fields (Custom Case Fields, Custom Staff fields, etc.). These fields will be fully integrated to your system. You may add more fields at any time, but add as many as you think you might need in the beginning.

Expert user tip: Be careful about deleting or editing fields after you have begun using Caseload Manager, as you might also delete the data attached to them.

SETTINGS MENU

- Customize the existing settings
 - [Referral Sources](#)
 - [Case Status](#)
 - [Case Types](#)
- [Global Settings](#)
 - Add-ons: Workgroups, Deadlines, etc.
- [Custom fields](#)
 - Custom Case Fields (case field access and custom case field reports)
 - Custom Party Fields (needed to report on any demographic data)



SETTINGS Exercise

- Customize Referral Sources, Case Status, and Case Types.
 - ✓ Click on each option, review what is there, make changes, and add in options for your Center.

The screenshot shows the 'Caseload Manager' application. At the top, there's a navigation bar with 'SETTINGS' and 'REPORTS' tabs. Below this, a dropdown menu is open, listing various settings options: Referral Sources, Case Status (highlighted with a red bar), Case Types, Staff Types, Staff Access Levels, 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, Automated Followups, and Surveys.

Below the dropdown, the 'Case Status' settings page is visible. It features a table with two columns: 'Status' and 'Sort Order'. The table lists various case statuses and their corresponding sort orders.

Status	Sort Order
Pending Deletion	1
Pending 2nd Party's Consent	5
Graceful Exit	10
Mediation - Active	15
Mediation - Resolved	31
Mediation - Not Resolved	32
Forms Needed	40
Need Mediator(s)	41
Inappropriate	50
Party Declined	50
Party Unavailable	60
Party Withdrawal	80
Payment pending	85
Other	999

EDIT MENU

- Edit and add to existing options
 - Calendar: print out a to-do list
 - All people: filter and print people lists
 - All staff: filter, print, and contact staff

Expert user tip: When you click on someone's name, their record pops up. Clicking delete, will delete that person and all of their history in Caseload Manager. If you want to delete them from a case, instead go to the bottom of their record and remove their association to that case.



CASELOAD MANAGERTM



CUSTOM FIELDS

Creating Custom Fields

Caseload Manager comes loaded with certain fields, such as Referral Sources and Case Type. You can also add your own fields to certain screens. These are called Custom Fields.

You may add Custom Fields to the Case, Calendar, Activity, Staff, and Participant Screens.

Create new custom fields in the SETTINGS menu

Type the question you would like to ask, how you would like people to answer that question (pull-down menu, date, etc.), and where you want that question to show up (sort order, what side of screen).

Using Custom Fields

- After you have created a custom field, you can use it like the other fields that were loaded with Caseload Manager
- You can change who has access to those fields by their access level or workgroup in SETTINGS> Case Field Access
- You can report on your Custom Field in Reports> Custom Field Crosstab

Expert user tip: Be careful of making fields required. You cannot save a record that has required fields without putting data into that field. This might force you to put in false data, in order to save a case, activity, or participant record.

Custom Fields Exercise

- Practice adding a custom field.
 - ✓ Click on SETTINGS > Custom Case Fields.
 - ✓ Type in the Text Prompt (Name) of your field, any choices, and select the type of field.

Caseload Manager Print

Customize Case Entry Screen

We suggest you place your most important custom fields first, as only the first 60 fields are filterable and can be sorted independently.
Only the first 2000 characters of text box fields are searchable.

Text Prompt	Field Type	# Choices	Required	Text Length (text type only)	Sort Order	Which Side of Page
6 County 그외에도	Text		<input type="checkbox"/>	20	10	Left
13 Date Scheduling Notice Mailed	Date		<input type="checkbox"/>	10	610	Left
20 Mediation Report Completed	Radio Button	2	<input checked="" type="checkbox"/>		620	Left
27 Children involved?	Pull-down Box	2	<input type="checkbox"/>		630	Left
Lender Requirements	Check Box	4	<input checked="" type="checkbox"/>		650	Right
Court Mandated?	Pull-down Box	2	<input type="checkbox"/>		660	Right
Date of Summons	Date		<input type="checkbox"/>		680	Left
History of DV	Pull-down Box	3	<input type="checkbox"/>		690	Left
Case was rejected due to time	Check Box	1	<input type="checkbox"/>		700	Left
Social Security Number	Text		<input type="checkbox"/>		710	Left

[Back to TOP](#)



CASELOAD MANAGERTM



MAIL HUB

Mail Hub

- The Mail Hub allows you to create emails from scratch, use existing email templates, create and print documents, and merge data from Caseload Manager into your correspondence.
- Emails come from your name and email in Caseload Manager. Replies come in to your current inbox.
- Sent emails will show up in the Mail Hub, in the Activity Hub, and in the associated Case.
- Paste any important information from replies as an activity inside a case.

Expert user tip: Send yourself a few test emails to understand how emails appear. Try different text substitutions.

Email

- [Send an email from within a case](#)
- [Create an email from scratch](#)
- [Create a template](#)
- [Use text substitutions](#)
- [Add attachments from computer or case file](#)
- You can choose to send correspondence as Email or Print/PDF
- View correspondence in email log and case file

Email Exercise

- Create an email template
- Use Text Substitutions
- Send yourself an email

Email Manager

Stored Email Templates

New Template

Leave Templates Alone

Possible Mediation

Thank you for contacting us about mediation

Mediation Arrangements

Final Agreement

First Mediation Meeting: Introductory Mediation & Mediation Progress - Initial Agreements

Edit & Send Edit Delete

Stored Correspondence

Sent/From	To	Case	Subject
07/15/11 Mediate.com Admin 12210	all staff		Party (CM test)
07/14/11 Mediate.com Admin 12210	Carol Knapp	Milton and Rex	test 5
07/14/11 Mediate.com Admin 12210	Knapp	Milton and Rex	test 4
06/28/11 Mediate.com Admin 12210	Knapp		test 3
06/28/11 Mediate.com Admin 12210	Knapp		test 2

To:
OR --Email to--
From: Mediate.com Admin 12210<admin@mediate.com>
CC:
Subject:
Text Substitutions: ~firstname~ | ~lastname~ | ~casename~ | ~email~ | ~password~
~streetaddress~ | ~date~

Format **Size** **Source**

Action: **Send** **To Print/PDF**



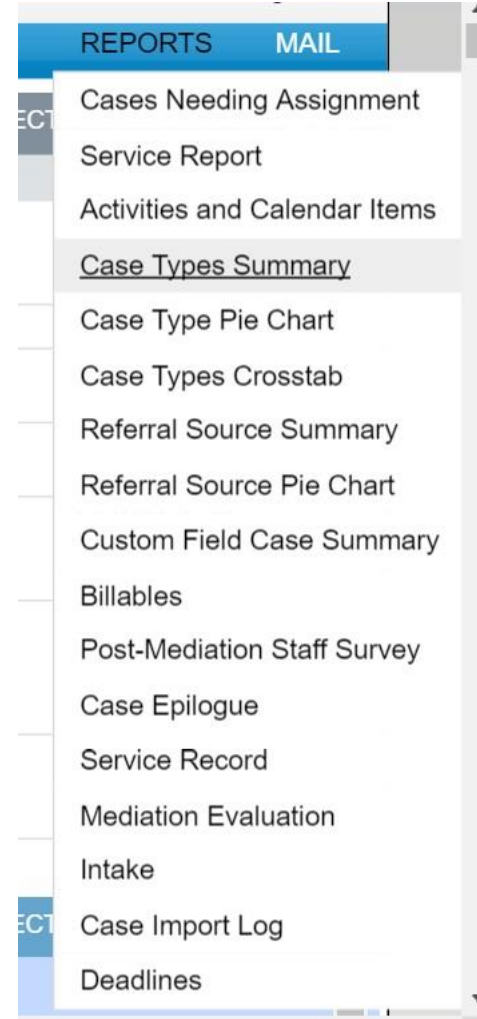
CASELOAD MANAGERTM



REPORTS HUB

Reports Hub

- Caseload Manager has two types of reports:
 - Export reports, that can be created, downloaded, and viewed offline
 - Canned reports that are available from the Reports Hub
- Canned Reports are found in the Reports menu



Reports Menu

- Cases Needing Assignment
- Service Report
- Activities and Calendar Items
- Case Type Summary
- Case Type Pie Chart
- Case Type Crosstab
- Referral Sources Summary
- Referral Sources Pie Chart
- Custom Field Case Summary
- Billing Report
- Survey Summary
- Deadlines

Exporting

- Exporting can be done anytime you see the word “Export”
 - Additional exporting options are **Filter** (Choose the type of data you want to include, such as a date range) and
 - **Select Fields** (Select what fields you want to be exported)

The screenshot shows the 'Caseload Manager' application interface. The 'People' tab is active, displaying a table of individuals. Above the table, there are four links: 'Add', 'Select Fields', 'Filter', and 'Export', all of which are highlighted with a pink box. To the right of the table, there is a sidebar with a list of categories: 'Calendar Items', '1: Plaintiffs', '2: Defendants', 'Participants', 'Attorneys', 'Advocates', 'Lenders', 'Consultants', 'Childrens', and 'All People'. The 'All People' option is also highlighted with a pink box. The table itself has columns for 'Type', 'Name', 'City', and 'Email'.

Type	Name	City	Email
Lender			
Attorney	Anderson, Mark	San Francisco	manderson@legala2.com
Participant	Arbett, Diane		diane.arbett@hotmail.com
Participant	Arbett, Joel	Midpoint	jarbett@wilsonx.com
Participant	Arbett, Sue		suez@arbettzxx.com
Participant	Bartowski, Sue	San Francisco	test@sloaumortizations.com
Participant	Bass, Susan		
Participant	Bloom, Joey	Eugene	joey@joeyvrcx.com
Attorney	Brewer, Joey	Denver	jblewu@jblewuxx.com
Attorney	Bronson, Kalani		
Participant	Casamar, Bill	Los Angeles	bcasamarz@casamar.org
Participant	Davies, Jacob	Eugene	jacobd@qlionslighting.org

Using an Exported File

- After you have exported a file, it will be on your computer.
- (It might be in your desktop, documents, or downloads.)
- [To create a spreadsheet](#), open up a blank spreadsheet in Excel.
 - Import your Caseload Manager file (Either “Import” or “Data>Get External Data>From Text.” Hit Next, Next, Finish, Ok.)
- [To create a document](#), open up a blank document in Word.
- Set –up a mail merge, type your document, and then merge in your Caseload Manager file.



CASELOAD MANAGERTM



SURVEYS

Creating Surveys

- Surveys are an optional add-on.
- Begin by creating surveys in SETTINGS > Surveys
- Add a new survey, following the prompts for creating your survey details and questions.
- When you save a survey, it will be assigned a number based on based on order created—the 1st survey created will be Survey 1, 2nd will be Survey 2, and so on.

Expert user tip: Surveys can either be filled out by case participants, or by staff.

Using Surveys

- After you have created a survey, you can send it to staff or participants—but not both
- Participant surveys can be sent to any participant assigned to a case
- Staff surveys can be sent to any staff members (mediators, volunteers, etc.)
- Staff surveys will appear in the edit case screen by their staff name
- Participant surveys can be sent using the Email Hub. Send participants a link to their survey by using text substitution. Each Survey will have its own text substitution, titled according to the number of the survey created. For instance, Survey 1 can be sent by typing ~survey1url~. Survey 2 will be ~survey2url~ and so on. When participants receive the email, the word ~survey1url~ will appear as a link which will take them directly to the correct survey.

Viewing Surveys

- Completed surveys will appear in SETTINGS > Surveys. In here you can view the individual survey responses
- Go to Reports to view the aggregate, summary survey results. You will find the results on the Reports list, by the Survey name
- You may highlight and copy this data, and paste it into Word or Excel
- You may not delete surveys. However, you can contact our office if a survey was entered incorrectly and we can delete it for you.



CASELOAD MANAGERTM



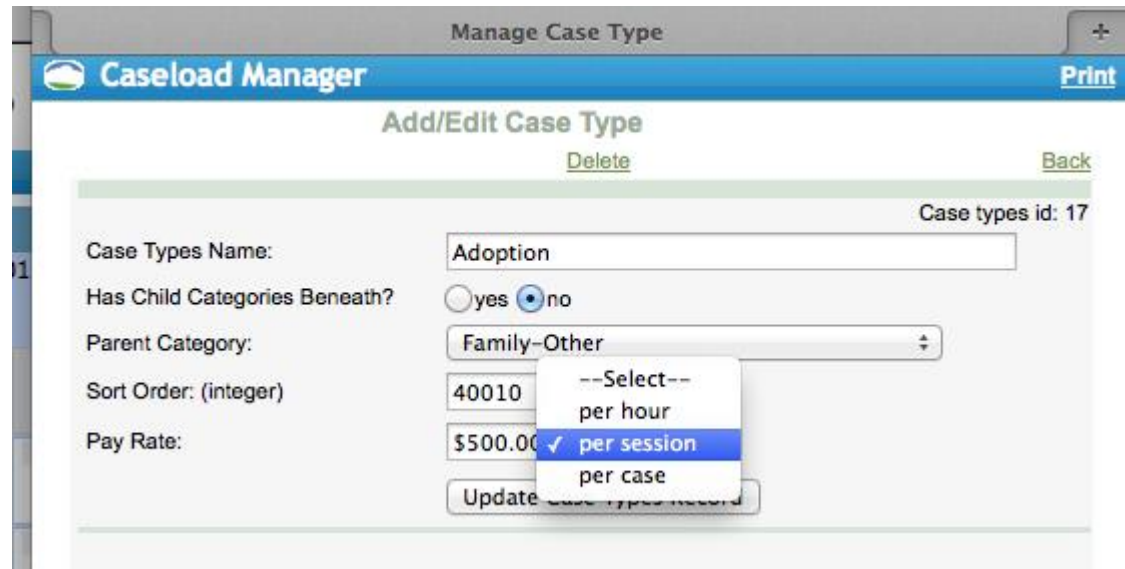
BILLING

Billing

- Caseload Manager is designed to manage your basic billing needs.
- It can track time, activities, and payment.
- It can generate reports of time spent and money owing.
- It can create automated invoices to send to clients.
- This system can be highly personalized based upon your office's unique needs.
- It is designed, however, to bill according to mediation center norms which are different than law firm norms.
- Even if your office does not charge for cases, you can use the billing information to track case time and volunteer time.

Billing Priority

- Override has the highest priority
- Activity/Calendar Type Charges have the next priority
- Case Types are the default amount, with the lowest priority
- Individual Activity Expenses per participant are added to the calculated balance due



The screenshot shows a web application window titled "Manage Case Type" with a sub-header "Caseload Manager". The main heading is "Add/Edit Case Type". There are links for "Delete" and "Back". The form contains the following fields:

- Case Types Name:** A text input field containing "Adoption".
- Has Child Categories Beneath?:** Radio buttons for "yes" and "no", with "no" selected.
- Parent Category:** A dropdown menu showing "Family-Other".
- Sort Order: (integer):** A text input field containing "40010".
- Pay Rate:** A text input field containing "\$500.00".

A dropdown menu is open for the "Pay Rate" field, showing the following options:

- Select--
- per hour
- per session** (selected)
- per case

At the bottom of the form is an "Update Case Type Record" button. The text "Case types id: 17" is visible in the top right corner of the form area.

Billing Set-up

- Set-up billing details in the SETTINGS menu
- In the Global Settings menu, determine minimum billing time increment
- In Case Types, determine charges for different case types (for instance: \$2,000 per divorce case; \$1,000 per arbitration session; and \$75 per hour mediating a community case.)
- [Create a billing invoice](#) in the Email Hub

Activity Billing

Caseload Manager is set-up to charge according to case types, but individual activities and calendar items can also add charges to that amount

Name	For Activity	For Calendar Item	Chargeable?	Amount	Per	Session?
Agreement Writing	Yes	Yes				
ALJ	Yes	Yes				
Board Review Hearing	Yes	Yes				
Business Lunch	Yes	Yes	Yes	\$56.00	per activity	
Casework	Yes	Yes				
Document Review	Yes					
Drafting	Yes					
Drop In	Yes					
Email (outside CM)	Yes	Yes				
Email Manager Correspondence	Yes	Yes				
FTF Caucus Meeting-session	Yes	Yes	Yes	\$145.00	per hour	Yes
FTF Joint Meeting	Yes	Yes				Yes
Housing Counseling		Yes				Yes
Intake	Yes	Yes				
Mediation		Yes				Yes

Calculating Bills

- After the billing details have been set-up, it will automatically calculate in the background as you are working the case.
- For instance, if you set your divorce case to bill at \$300 per hour, then if you have a 3 hour meeting, the case will automatically set a balance due of \$900.
- You may change that amount by setting an override amount in the upper left of the case screen
- You may add to that amount by setting an individual charge per person or per activity in the activity details

Reporting Billing

- [Reports](#) The Reports Hub has a report created that will show you the total due for your cases within a specified time period, and how that amount was calculated. You can also click on the Activities and Calendar Report to get a summary of time per case and staff
- Exporting: You can copy and paste the information from the billables report, or you can select the case fields and export them.
- [Invoicing](#): Create an invoice in the email Hub to send to clients



CASELOAD MANAGERTM



ADVANCED FEATURES

Workgroups

- Workgroups are an optional add-on feature. They are designed to help organize your system. You can group staff into workgroups, and then assign cases and fields to those workgroups
- Once enabled, you will find workgroups in the EDIT menu
- Begin by creating a master workgroup, with the admins as the supervisor, and all of your staff as members
- Next, create lower level workgroups for all of your different cases, projects, or departments. For instance, divorce, or restorative justice, or foreclosure, or trainings. Assign supervisors and members.

Using Workgroups

- You can add certain fields to workgroups in SETTINGS > Case Field Access. For instance, you will probably want to assign any custom divorce fields to your divorce workgroup (which means those fields will not show up other workgroups, unless specifically assigned to them as well)
- Every time you add a new case, you will need to assign it to a workgroup. Then you can add staff to that case that have also been assigned to that workgroup.
- To display the cases and activities for a workgroup, click on display (top of the home screen) and select the workgroup's name.

Automated Follow-ups

- Create a template in Email Hub
- Create a follow-up in SETTINGS
- Trigger that follow-up in a Calendar Item
- Based on a set amount of time after the calendar item, such as “send this email 5 days after the meeting.)

Expert user tip: Create a “Case Opening” follow-up, designed to automatically send all of the correspondence that clients need to begin mediating. Then you know that your clients will come to mediation prepared with everything they need to know. For instance, create email templates, and then create an Automated Follow-up, that will send clients 1: What to Expect in a Mediation, 2: Confidentiality Agreement, 3: Fee Structure, 4: Directions to Office, and 5: Invoice and Evaluation (sent 30 days later).

Deadlines vs. Auto-Follow-ups

- Deadlines are based on a set amount of time **in-between two items**
- Deadlines can be triggered by **case, activity, calendar, and participant items**
- Automated Follow-ups are set to follow-up **after a set amount of time from one item**
- Automated Follow-ups can only be triggered by **calendar items**

Caseload Manager				Print	Close
Deadlines					
Add					
Main Action	Within ## Days Of	Earlier Action	Priority		
Education Session	35	Homeowner Date of Summons	1		
Date entered pre-mediation	7	Education Session	2		
Pre-Mediation Session	30	Education Session	3		
Mediation	35	Date referred to mediation	4		

Deadlines Creation

1. Create the necessary fields to trigger a deadline, such as “Date Contract Requested” (Earlier Action) and “Date Contract Received” (Main Action)
2. Then create the template in the Email Hub that will alert people of the deadline, such as “After we request the contract, we must receive it within 35 days.”
3. Then create the deadline, indicating that the main action must happen within 35 days of the Earlier Trigger Action.

Edit Deadline

Delete

Record id: 4

Check for Main Action

Education Session

OR -- Participant Custom Date Field: --

OR -- Case Custom Date Field: --

Within 35 days of

Earlier Action

-- Activity/Calendar Type: --

OR Homeowner Date of Summons

OR -- Case Custom DateField: --

Priority 1 1=highest,100=lowest

Color

Update Record

Deadlines Reporting

Once you have set-up your Deadlines, there are three ways to view the deadline information.

1. After you have created deadlines, you can view whether a participant has passed the deadline because the font color will change.
2. You may filter for cases with passed deadlines in the Cases Hub Filter.
3. You may view a report on Deadlines in the Reports Hub



Contact us with any questions or requests for additional training at 541.345.1629, [Here](#), or Support@CaseloadManager.com