

Introduction

interMediate manages a mixed bag of any type of mediation casework. This enables mediation services to grow into new types of mediation, without artificial constraints imposed by the case management system.

Most family mediation services are funded by the Legal Services Commission (LSC) and need to create monthly reports and claims in the format required by the LSC. (See the LSC's *Guidance for Reporting Work Under the New Family Mediation Contracts Version 1.3 – June 2009*.) interMediate includes this capability, automatically compiling claims in accordance with the LSC guide for qualifying cases, whilst ignoring others. This guide is a description of how to do this, supplementing interMediate's Help pages.

interMediate Configuration

The LSC Guide specifies the range of entries that may be made in certain fields in LSC funded cases. These appear as selections in pop-up menus that may also include other selections for cases unconnected with the LSC. This allows the same menus to be used for both LSC funded cases and other cases.

When newly installed, interMediate includes LSC entries in the following menus:

- Case source - on the Case Summary screen;
- Case mediation method - on the Case Summary screen;
- Party age range - on the Case Parties Edit screen;
- Party ethnic origin - on the Case Parties Edit screen, Demographics window;
- Work type - on the Case Events screen, Event Type menu;
- Case Outcome - on the Case Summary and Case Events screens.

For family mediation services, these entries should not be changed unless the LSC changes the reporting method. The Party Ethnicity menu includes the government's standard definitions for ethnic origin, which interMediate interprets and reports as LSC codes. When popped up for making a selection, these menus appear with reminders that the LSC selections should not be changed.

The LSC also requires mediation services to register their Outreach Locations and log the location at which LSC funded cases are conducted. The locations are entered by the Administrator on the Set Up screen and used in the Outreach Location menu on the Case Summary screen. Entering this information is the only action necessary to set up interMediate for LSC reporting.

Case Management Process

Many family mediation services manage cases by reference to three stages in the life of a case: Enquiry, Assessment and Mediation. These stages relate to the LSC reporting procedure, particularly for differentiating between claims for assessments and for closed Cases.

In interMediate, Enquiry and Case are stages in the life of the same records, differentiated by their status as Current Enquiry, Discontinued Enquiry, Current Case, Discontinued Case or Completed Case. The Case/Enquiry List screen may be used to show Current Enquiries, Current Cases or Old Cases (ie: completed or discontinued). All case management functions are available in every record, regardless of the record's status.

Enquiry Adding a new Enquiry in interMediate is straightforward. On the Case/Enquiry List or Case Summary screens, click the Add Enquiry button. interMediate opens a window for specifying a new record which is created as the window closes. Enquiries are created with the status Current Enquiry and appear on the Enquiries view of the Case/Enquiry List. The record is usually used for assessment until it's accepted as a Case or Discontinued, using the Change button on the Case Summary screen.

Some mediation services record and check enquiries before entering them in the casework database at all. interMediate supports this by allowing new enquiries to be entered in a subsidiary database, and then transferred to interMediate once a decision has been made to treat them as Enquiries. Further information about this is available on request.

Assessment Enquiry records appear on the Current Enquiries view of the Case/Enquiry List. They're usually used for Assessment and then either Accepted as Cases or Discontinued. During this stage in the life of a Case/Enquiry record, a Willingness Test and Assessment Meetings may be conducted, as specified in the LSC Guide. These are included in the Enquiry record on the Case Events screen.

Mediation Once an Enquiry is accepted it becomes a Current Case and appears on the Current Cases view of the Case/Enquiry List. This change is made by the Change button on the Case Summary screen. Current Case is the stage during which mediation meetings usually take place, appearing in interMediate on both the Case Events screen and the Case Meetings screen. Once the Case is completed or discontinued, on the Case/Enquiry List it moves from the Current Cases view to the Old Cases view.

Capturing Data for LSC Reports

The LSC Guide specifies some rules:

- Cases/Enquiries qualify for funding if at least one of the Parties qualifies;
- until it's clear whether or not Parties qualify, a Willingness Test and some Assessment claims may be made under the Funding Code Referral process;
- in qualifying Cases/Enquiries, claims may be made for Willingness Tests, Assessments and Meetings, plus Disbursements connected with these events and supporting administration.

interMediate implements these rules automatically and compiles LSC claims accordingly. The automatically compiled information may be edited manually if necessary, until it's submitted in a claim. Data can't be submitted more than once.

To mark a Case/Enquiry as qualifying for LSC funding, on the Case Summary screen click the checkbox LSC Funding. interMediate checks that either the Case Source is set as Funding Code Referral or that one of the Parties is marked as qualifying on the Case Parties screen. The Enquiry/Case is marked as qualifying or not depending on these entries.

On the Case Events screen, in qualifying Cases/Enquiries, Events with LSC Event Types qualify for funding. Immediately below the Event Summary, two checkboxes show whether or not the Case/Enquiry and the Event qualify for public funding. As completion dates are entered for qualifying Events, interMediate automatically logs the dates for reporting in LSC claims. If the Case/Enquiry or Event don't qualify, or if no completion date is entered, the Event date isn't logged.

To see the Event dates that are logged in qualifying Cases/Enquiries, on the Case Summary or Case Events screen click the Dates button. In the Dates window an Event's date can be edited until the Event is submitted to the LSC in a claim. After submission the event date can't be edited and next to the date interMediate shows the month and year of the report in which it was included.

The LSC Guide allows disbursements to be claimed for all LSC Work Types, including Document Preparation and Correspondence. On the Case Events screen, to mark a qualifying Event for charging to the LSC, below the Event Summary click the LSC Charging checkbox. In the LSC Closed Cases report, the total amount of disbursements is entered for all LSC qualifying Events in the Case.

Producing, Checking and Submitting LSC Reports

To produce the monthly reports described in the LSC Guide, click the Reports icon, then the LSC Reporting button. The LSC Reporting window opens, in which the reports are described. Please note, the Consolidated Work Report Form is produced in two parts, one for Assessments and one for Cases closed within the reporting month. The report may be produced for Checking or Submission. Submission prevents double reporting of the same data in later reports.

The LSC Reporting screen includes a Help button that delivers pages describing LSC reporting.

Resolute Systems

Resolute Systems (UK) Limited 9 Marlow Road High Wycombe HP11 1TA United Kingdom

Telephone: 01494 520088

Email: sales@resolutesystems.co.uk

Company registration: 3826934

VAT registration: 776 3622 04