TXdocs Mediator

USER MANUAL

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Welcome to TXdocs' Mediator

1   Welcome to TXdocs' Mediator

Welcome to TXdocs® Mediator

TXdocs' Mediator was created to facilitating divorce mediation in Texas. Here is what it does in a nutshell:

- Saves time accumulating the necessary information about the issues, parties, children and property (assets and liabilities)

- Allows you to use your mouse to click on hundreds of options to address virtually any issue that might arise in a divorce mediation

- Displays the current status of all issues during the mediation process

- Allows you to assemble a comprehensive Mediated Settlement Agreement covering all issues with a few clicks of the mouse

If an attorney involved in the mediation uses TXdocs document assembly software, you can save a tremendous amount of time by having that attorney upload the case information (parties, children, issues, and a complete proposed division of property) directly from TXdocs into your Mediator case.

To get a quick overview of how TXdocs' Mediator works please take a few minutes to browse through our Chapters 1 and 2 in our help system. You can easily do that by clicking on the navigation arrows in the top left corner of this window.

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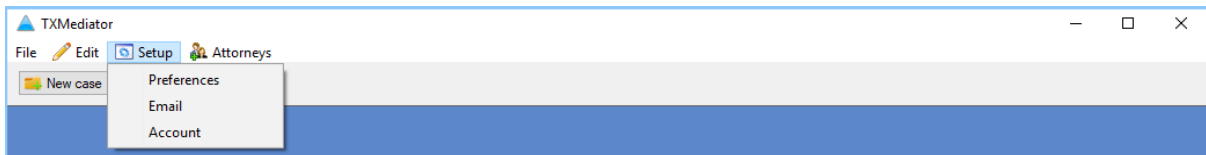template if you want it completely blank.

Chapter 1 Getting Started

## 2   Chapter 1 Getting Started

2.1   Initial Setup

The first thing you want to do is set up Mediator to work the way you want it to work.

1. Click on Setup on the main menu.
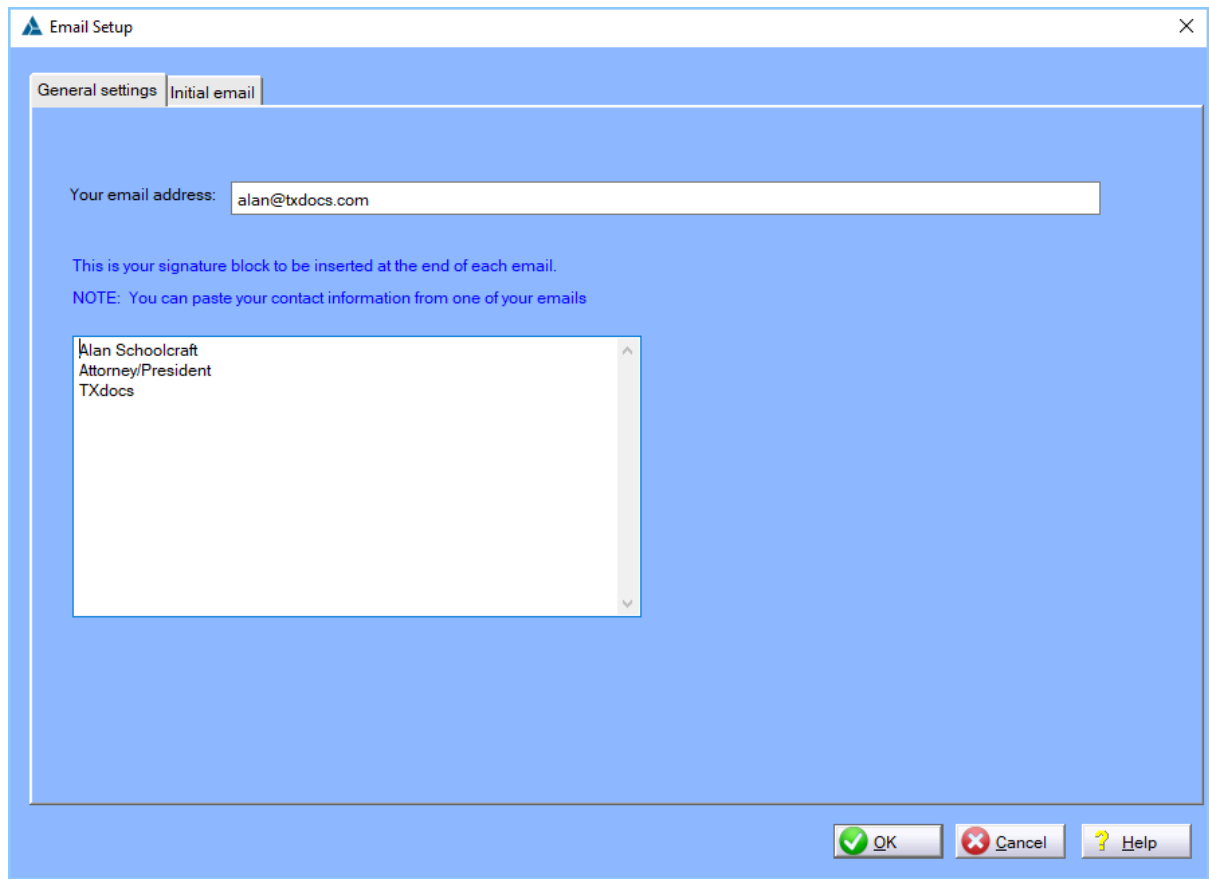
2. Select the preferences item on the setup menu to enter basic preferences. Enter your name as you want it to appear on signature lines and select whether you want to use Word or WordPerfect as your word processor.

Mediator gives you a choice of two different types of property listings. The long form provides all of the asset and debt categories used on a standard Inventory and Appraisement. This is the format that will always be used for a case in which the data has been uploaded by one of the attorneys. The short form provides only 6 categories or assets, 3 categories of debts, and only one category for retirement accounts/benefits. Also, there is much less detail to enter for each item. Basically, you will just enter a short description of the asset or debt and fill in as many details as you need to properly identify the item. See the description of the Property 21 window for more information. Check the box if you want Mediator to use the short form by default when a new case is created.
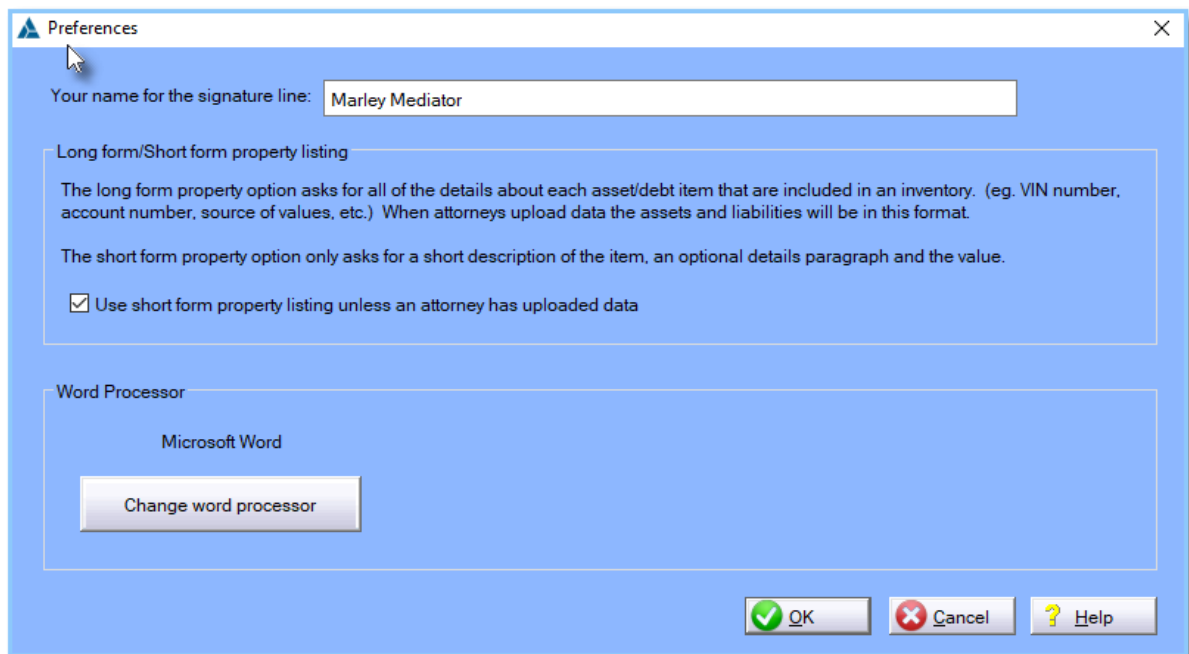

3. TXdocs' Mediator will automatically send a couple of emails to attorneys in the case. The Email Setup window is where you specify how you want these to look.

The second tab for email setup is where you can enter the text of the initial email TXdocs will send to the attorneys. In addition to the text of the email, TXdocs will append the signature block you set up in the first tab as well as instructions on how to upload information from TXdocs to you.   You can also specify up to 5 attachments to be included. This is just a default setting. When you actually send the email, you will be able to edit the contents of the email as well as change the attachments.
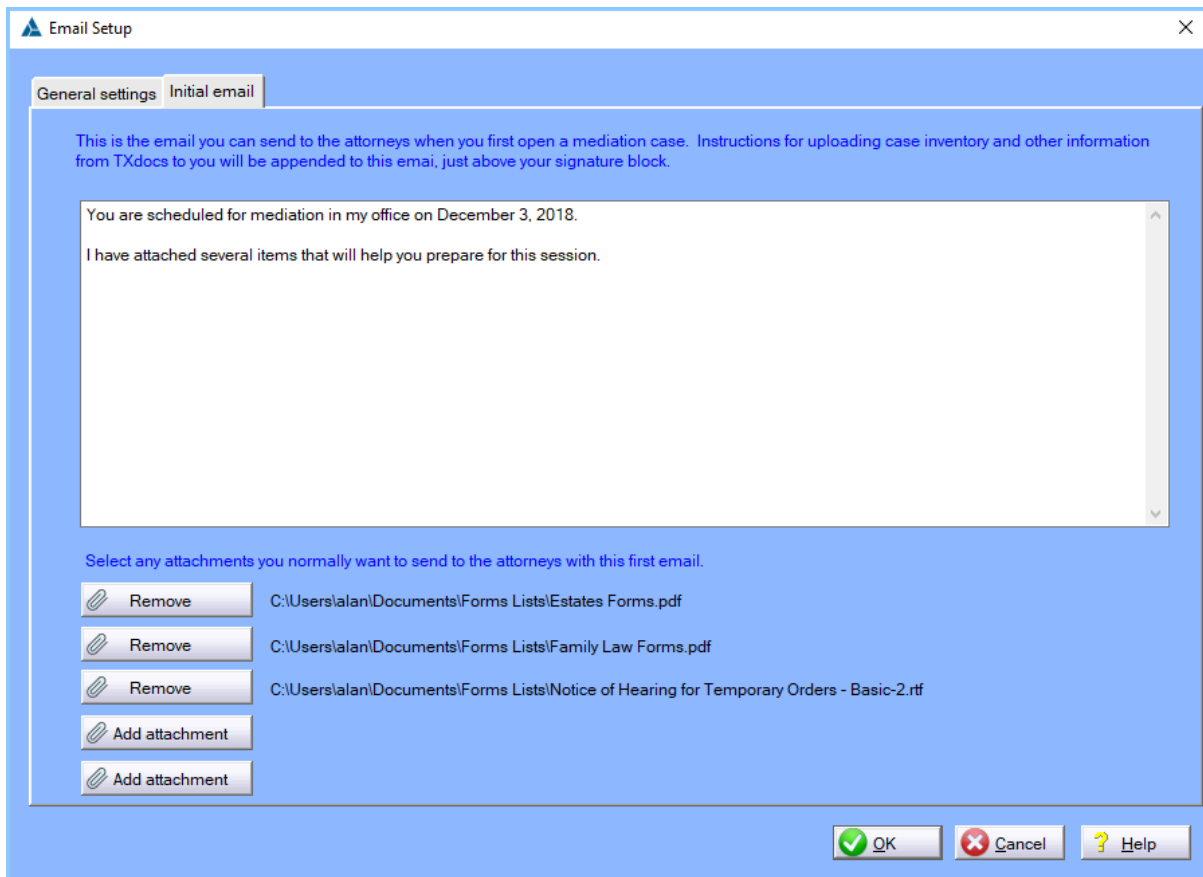
4. Under Setup/Account, you will be able to edit the information associated with your account at TXdocs.

2.2   Adding a new case

1. To create a new mediation case, click the "New case" button on the toolbar. If this button is not visible, it is because you already have a case open. You will need to close that case before you can create a new one.
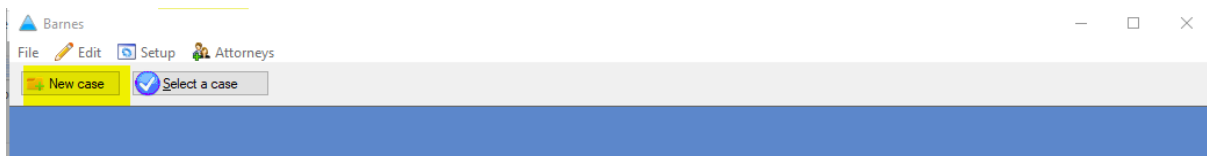
2. Fill in the information for the new case. The case description is what will be displayed on the list of cases when you select a case to work on. So, enter whatever you need in the description field to be able to identify which case you want. The "Parties are pro se" checkbox can be used by mediators who handle cases where neither side has an attorney. For these cases, the attorney's name selections will be disabled and other areas in the program will be changed to accommodate that type of case. To select the attorneys, click the "Select" button. TXdocs will generate an introductory email for you to send each attorney with information needed to upload case information from their TXdocs program. Click here for information about this email.

3. After you create the new case and if you selected at least one attorney, Mediator will open the Send Introductory Email window for you to set up how the attorneys will be notified about how to upload information to this case.
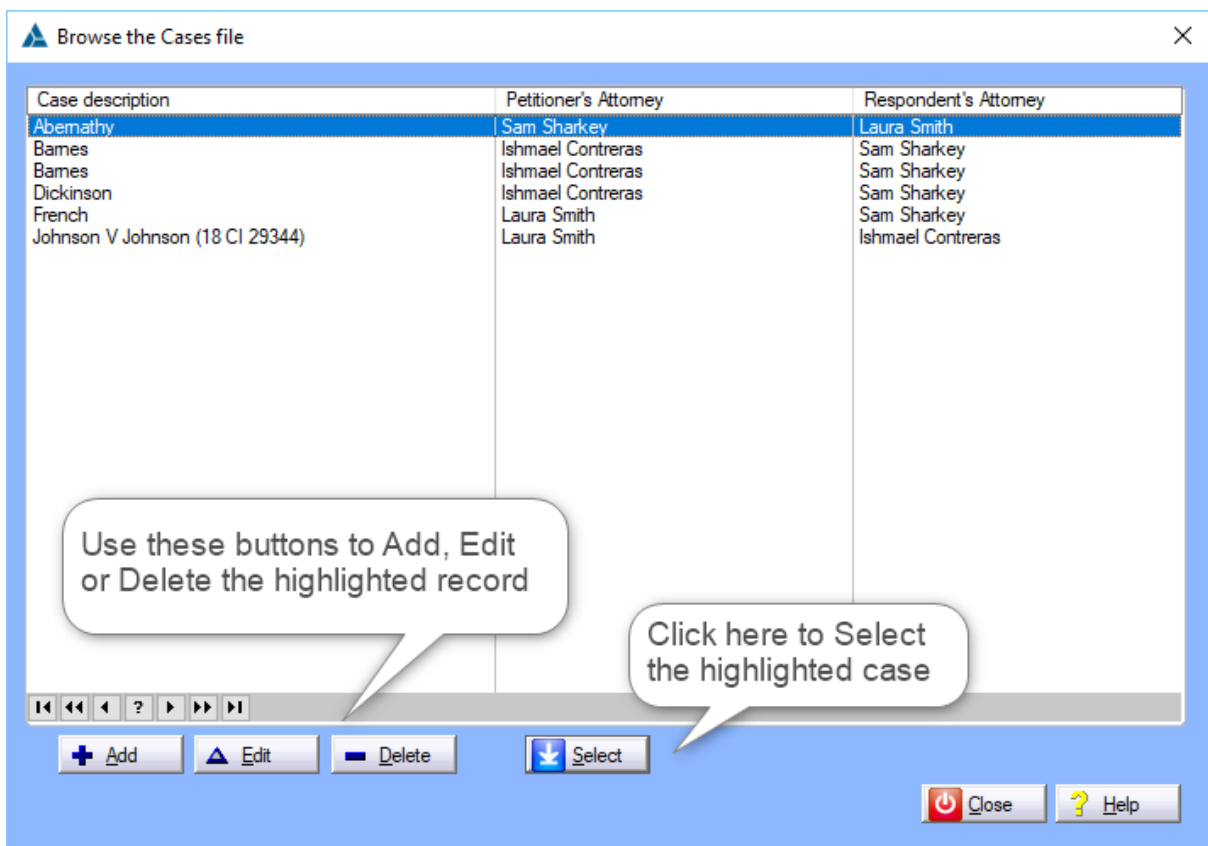
2.3 Selecting an existing case

1. To get started working with a case, click the "Select a case" button.

2. The Select a Case window is where you select an existing case to work with. You can also use the buttons at the bottom to Add a new case or Edit or Delete an existing case.

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Chapter 2 Using Mediator

3   **Chapter 2 Using Mediator**

3.1   **Case Manager**

1. The Case Manager is the starting point for every case. Here you will provide basic information about the parties and children and you will select which issues will be addressed in this case. You will also manage case notes and documents you create for the case and you will be able to manage how attorneys upload data to your case. Open Case Manager by clicking on the Case Manager button on the toolbar after you have selected a case.
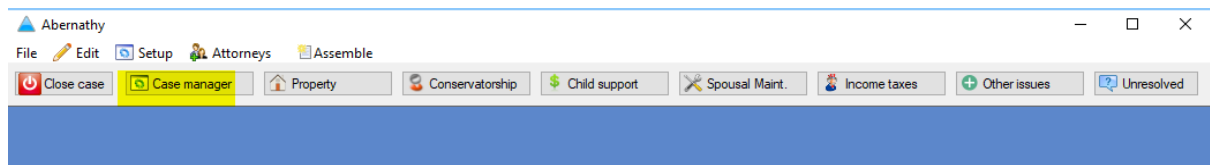
2. When you select the various checkboxes for the issues listed on this window, their corresponding buttons will become available on the toolbar shown above. Each button will open a different window where you can provide the details on how that issue is being resolved. Click here for detailed information about each item on this window.

3. If the parties are pro se or if the divorce proceeding has not yet been filed, fields for entering labels for the parties will be displayed. This is because you don't yet know which of the parties is Petitioner.

4. The Documents tab lists all documents you have assembled for this case. There is a Download button to download the highlighted document to your computer from TXdocs' server. If you are using Microsoft's web based Word 365 (highly recommended by us) then you will also see an Open button.
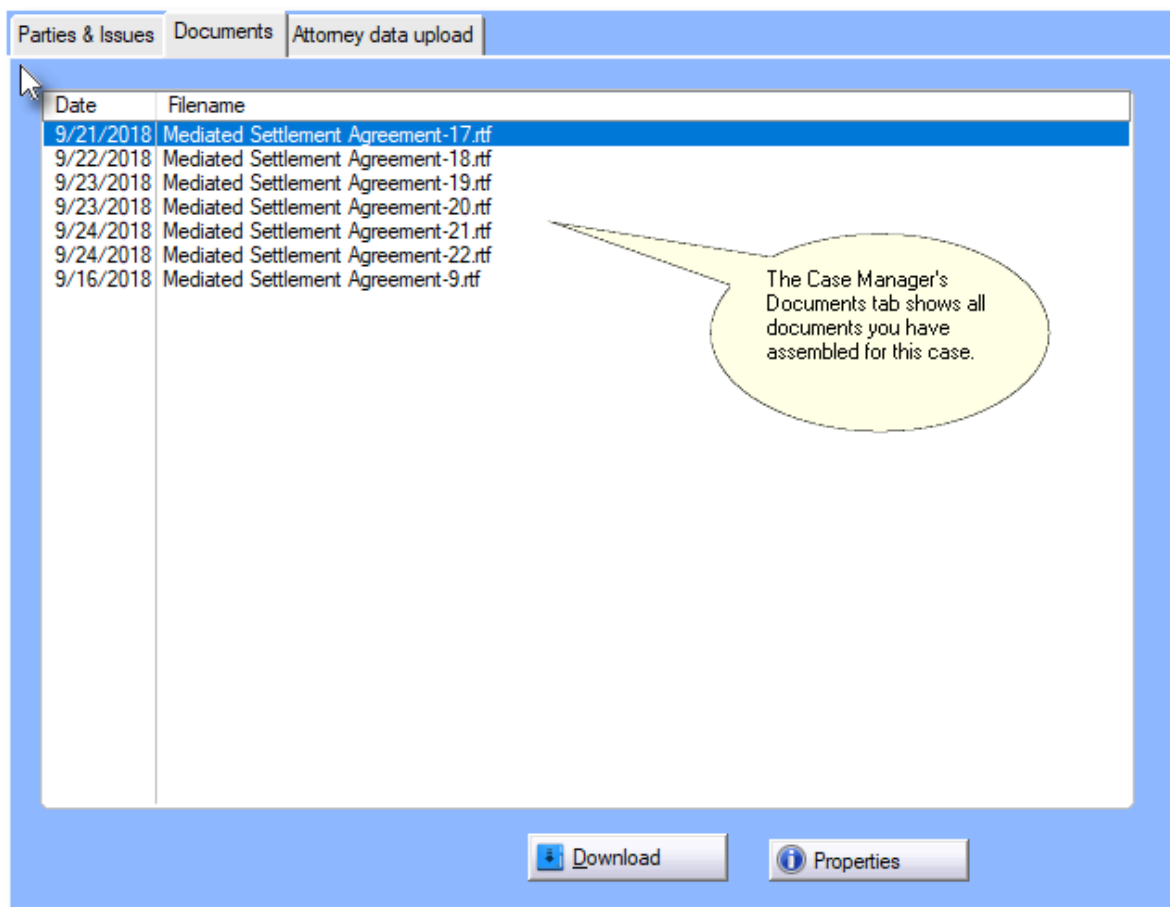
5. The Attorney data upload tab is where you manage the process of having an attorney upload the case data to your mediator case file. If you did not send the notification to the attorneys when you first created the case, you can click on "Send introductory email to attorneys" to send it now. Or, if an attorney contacts you and says he/she can't find the instructions that were previously sent, you can click on "email upload instructions to Petitioner's/Respondent's attorney" to re-send them. Only one upload is allowed per case.

The "Manage uploaded data" box gives you a couple of options relating to data that has been uploaded. Only one data upload is permitted per case. (This is because it would be very complex to try to manage the differences between how the two attorneys entered the same information) If, for some reason, you want to replace the uploaded data with a new upload, click "Delete uploaded data to allow a new upload". The uploaded data is all formatted and organized based on the standard Inventory and Appraisement. As a result, it is not possible to use Mediator's short form property listing with this data. If, for some reason, you want to ignore the uploaded data and and instead enter everything using Mediator's short form, you can check "Use short form inventory anyway (ignore uploaded data)"

3.2   Property

Mediator's Property Division window provides an easy way to list all assets and liabilities. Property can be awarded to one of the parties, sold, or otherwise disposed of. To award an item, simply click on the appropriate column. As you click to award an item, the totals and percentages for each party are updated and displayed on the right side of the window.

If you click on "Other" or "Sell" then a window will pop up where you enter the details of the sale or other disposition.

When discussing the Property Division window, we use the terms "Category" and "item". In the screen shot below, an example of a category is "Vehicles, Boats, Airplanes, etc.". An example of an item is "2013 Ford F150".

CAUTION: Always click the "Save and Close" button when exiting this window so that your work will be saved.

Adding and Editing Items

There are 3 ways to add an item into the list. (1) Double click on the category title you want you want to add to; (2) Right click on a category title or item to another item in the same category; or (3) Click on the "Add" button and select the category you want to add to.

There are two ways to edit an item. (1) Highlight the item and click the "Edit" button or (2) Double click on the item's description or amount.. Clicking on the "Edit" button will open a popup window where you can edit everything about the item. If you double click on the description or amount, you will be able to directly edit those columns in the list. This is called inline editing.

Notes

If there is something you need to remember about any of the items on this list you can make a note. To do that, simply click the Notes column and a form will open for you to enter whatever you want. To see your notes, select the "Notes/Custom provisions tab. You can leave this tab selected and, as you scroll through the items, any notes you have entered will be displayed. You print a copy of all notes by selecting Notes under the Assemble item on the main menu. The Note column will display a pencil icon for an item that has a note.

<u>Short Form Property listing</u>

All of the screen shots above show the Property Division window using the long form listing. Notice that the categories are the same categories you will see in a standard Inventory and Appraisement form. Mediator also lets you use a "short form" property listing. With the short form, you can enter the assets and liabilities using just 6 categories or assets, 3 categories of debts and 1 category for retirement benefits. Additionally, for each item you enter into the short form listing, you will only need to provide (1) a short description of the item; and (2) The value of the asset or amount of the debt. You will also have a textbox where you can enter any additional information you wish to include in order to fully describe the item. The purpose of providing the short form is to give you a faster way to enter in all of the asset and libility items if neither attorney uploads that data. Below is a screen shot showing the short form listing with a pop up window open for adding a real estate item.

3.3   Conservatorship

The Conservatorship window is the most comprehensive window in Mediator. Here you can select the terms for a complete parenting plan, including all provisions in a standard possession order and provisions for children's property, special possession provisions for children under 3, tax returns for the children, parenting websites, allocation of rights, and much more.

When you first open the window, you will see the screen shown below. As you select different options, additional tabs will be displayed for you to select further details about each selection. See the next screen shot to see all of the tabs that may be displayed.

Notice the "Conservatorship issues are resolved" checkbox. Each of the main windows for issues contain one of these checkboxes. After you resolve all issues related to Conservatorship and the "Conservatorship" button on the toolbar will change to green with a checkmark to show that this portion of the mediation is completed.

Depending on which options you choose on the main tab, some or all of the additional tabs shown below will become available for you to select additional details.

Split Custody

With split custody the parties can agree give each parent primary conservatorship for one or more of the children. You click to select which children go with which parent. Then you can select how parental rights are allocated between the parties. The MSA will be assembled with complete possession orders for each parent.

Children's Property

The Children's Property window is pretty simple. All you need to do is enter the property that each parent is given control over. Enter it as a list.

Travel Provisions

On this tab you select options provisions covering the children's travel arrangements.

Weekends/Fathers/Mothers

On this tab you specify beginning and ending dates and times for weekends, weekdays, Mother's Day and Father's Day. This tab is only available if, on the first tab, you select that you want to deviate from the Standard Possession Order.

Holidays/Summers

On this tab you specify beginning and ending dates and times for holiday and summer possessions. This tab is only available if, on the first tab, you select that you want to deviate from the Standard Possession Order.

Jewish 1 and Jewish 2

If, on the first tab, you select "Include Jewish Holidays", these two tabs allow you to select which holidays to include and to enter the agreed upon terms for possession on those days.

3.4 Child support

On this window you establish the terms for payment of Child Support and provisions for Medical and Dental support. You can also select optional provisions like splitting expenses for daycare, private school, extracurricular activities, etc.

Click this button to pop up a Child Support Calculator

The calculator also calculates stepdown amounts

Optional Provisions

On this tab you can select any of the listed options and specify what percent of the cost each party will pay.

Medical Support

Dental Support
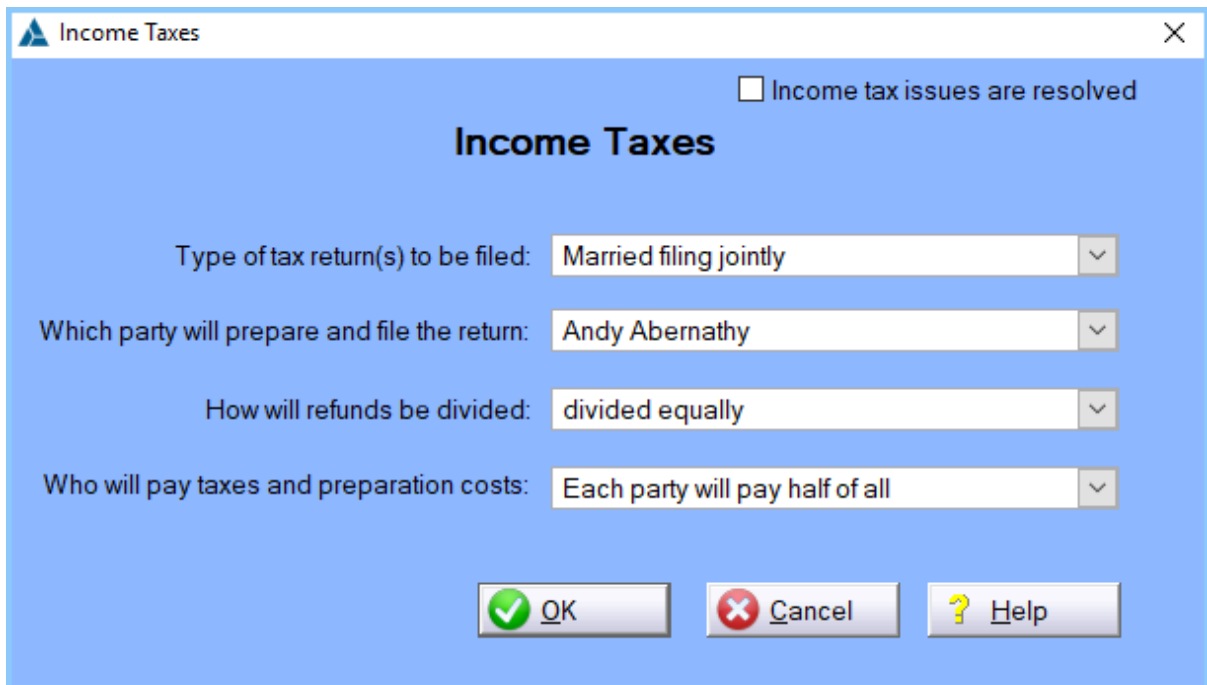
3.5   Spousal Maintenance

If the parties agree that a party will pay spousal maintenance, this window provides an efficient way to select the provisions to include in the spousal maintenance section of the MSA.

3.6   Income taxes

The Income Taxes window provides an easy way to select the provisions to include in the optional section in the Mediated Settlement Agreement.

3.7   Other issues

The Other Issues window contains a few miscellaneous issues the parties may wish to include in the mediation.

If we tried to handle every conceivable issue that could ever come up in a mediation this program would be so complex nobody could use it. So, we added a section at the bottom of this window where you can add an unlimited number of "Other" issues. Click the "Add" button to add other issues.

Notice the "Other issues have all been resolved" checkbox. Each of the main windows for issues contain one of these checkboxes. After you resolve all "Other" issues the "Other" button on the toolbar will change to green with a checkmark to show that this portion of the mediation is completed.

Credit Cards

On the Credit cards tab you can list any credit cards that are to be awarded to the parties or to be destroyed. Click on the checkbox to enable the fields where you list the card(s).

3.8   Unresolved issues

If there are any issues that are unresolved you can include a description of those issues in the completed MSA.

1. In the Case Manager, you need to check the box indicating "This is a partial settlement and there are unresolved issues remaining."

2. After you close the Case Manager, the "Unresolved" button will be available on the toolbar.
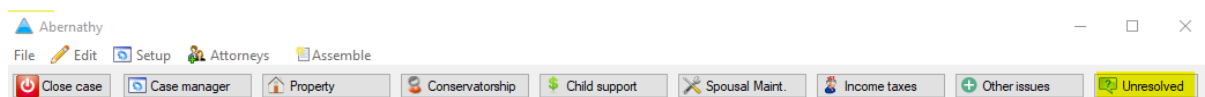
3. Clicking the Unresolved button will open the Unresolved Issues window. On this window, when you click the Add or Edit button another window will pop up for you to enter a description of the issues that remains unresolved.

Chapter 3 Working with attorneys

4   Chapter 3 Working with attorneys
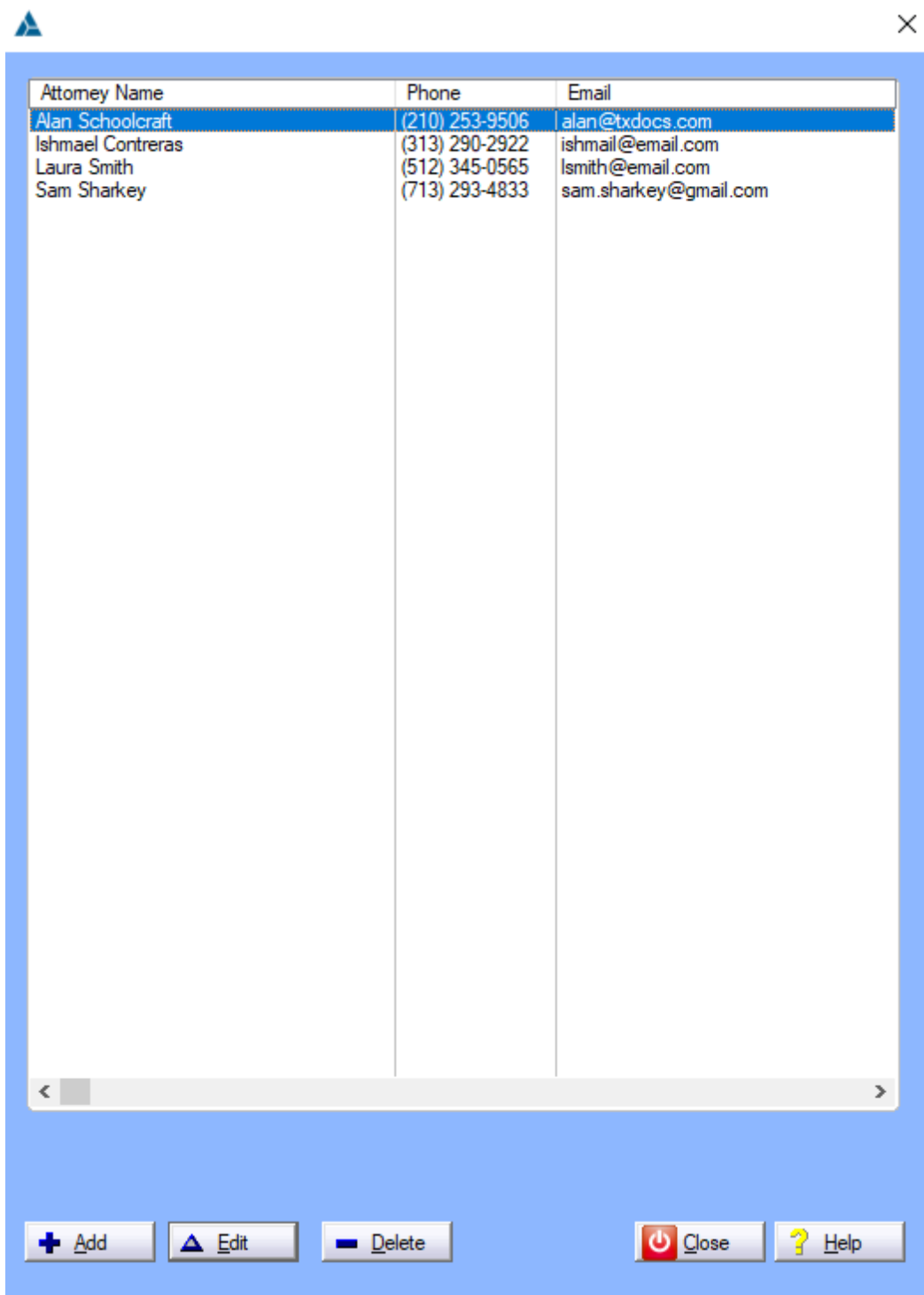
4.1   Attorneys List

TXdocs' Mediator will save the information for all attorneys you work with so that you don't have to re-enter their information every time you open a new case. And, as an extra benefit, Mediator provides a window where you can browse through the attorneys just like you would a contacts list.

1. To Open your Attorneys List, click on the "Attorneys" on the main menu.
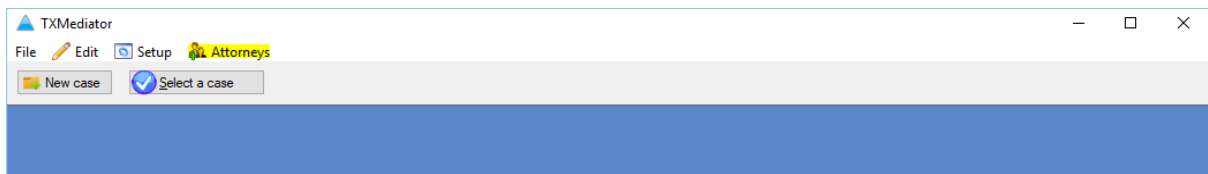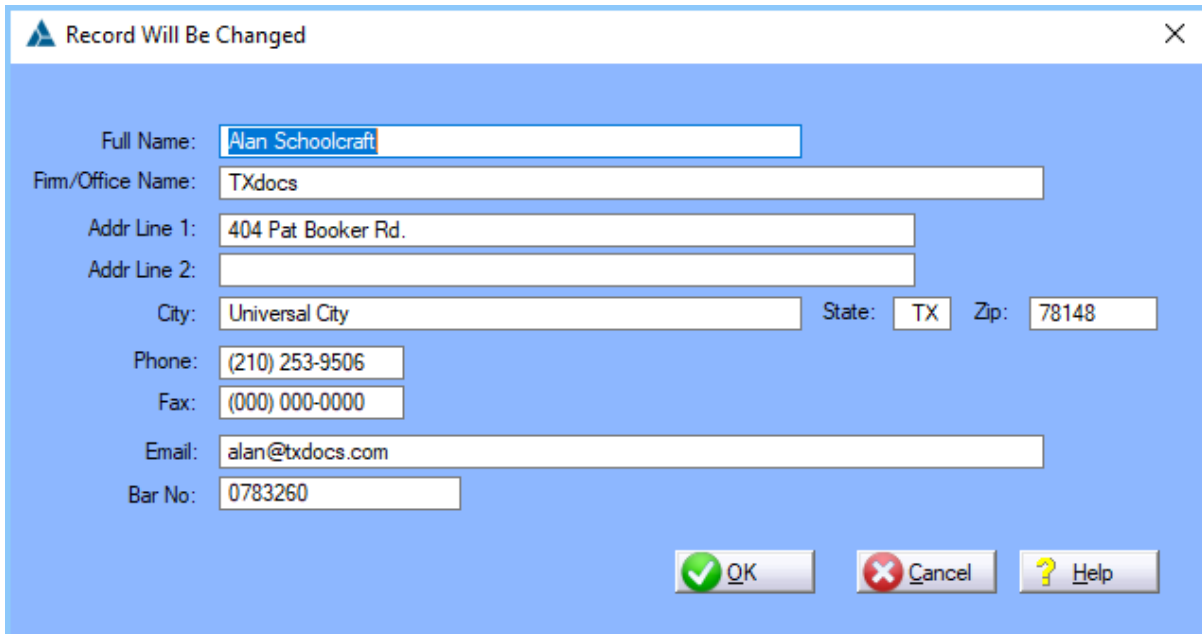
2. After the Attorneys List window opens, click on the Add or Edit buttons to add an attorney or to edit an attorney's information.

3. The Add and Edit buttons will open this window where you can enter or change contact information for the selected attorney.

4.2   Case attorneys

The previous topic showed you how to add attorneys in the Attorneys List. You can also add attorneys to the list when you create a new case.

1. To create a new case, click on the "New Case" button on the toolbar. Note: This button is only available if you do not have a case open already.)

2. The New Case button opens the "New Case" window. Click on the "Select" buttons to select the attorney who is representing each party.
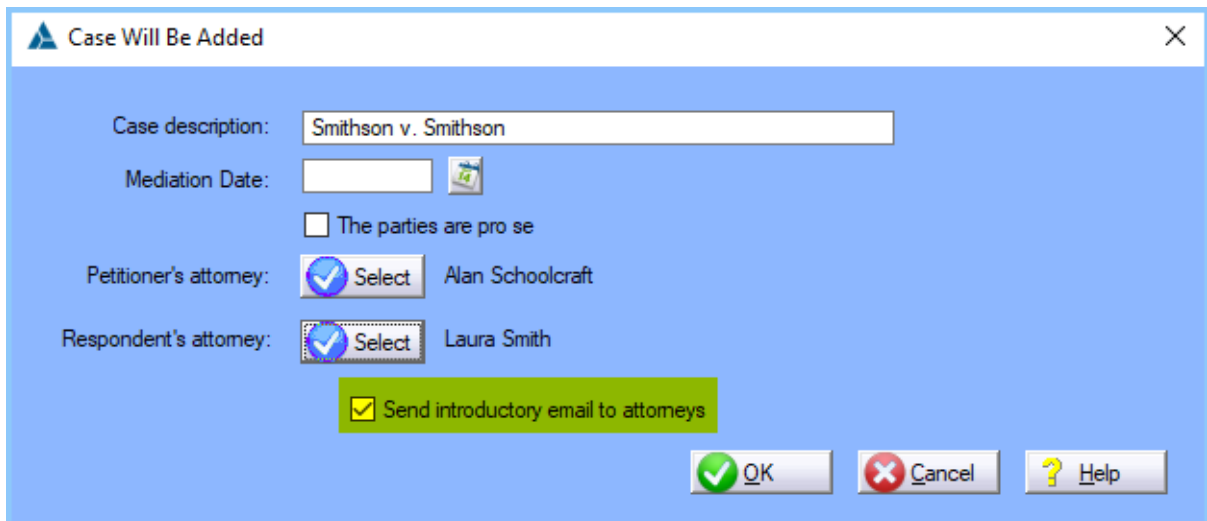
3. When you click on Select, the Attorneys List window opens. But, there is now a "Select" button available on that window. If the attorney you need is already in the list, simply highlight the attorney and click Select. Otherwise, use the "Add" button to add the attorney to your list.
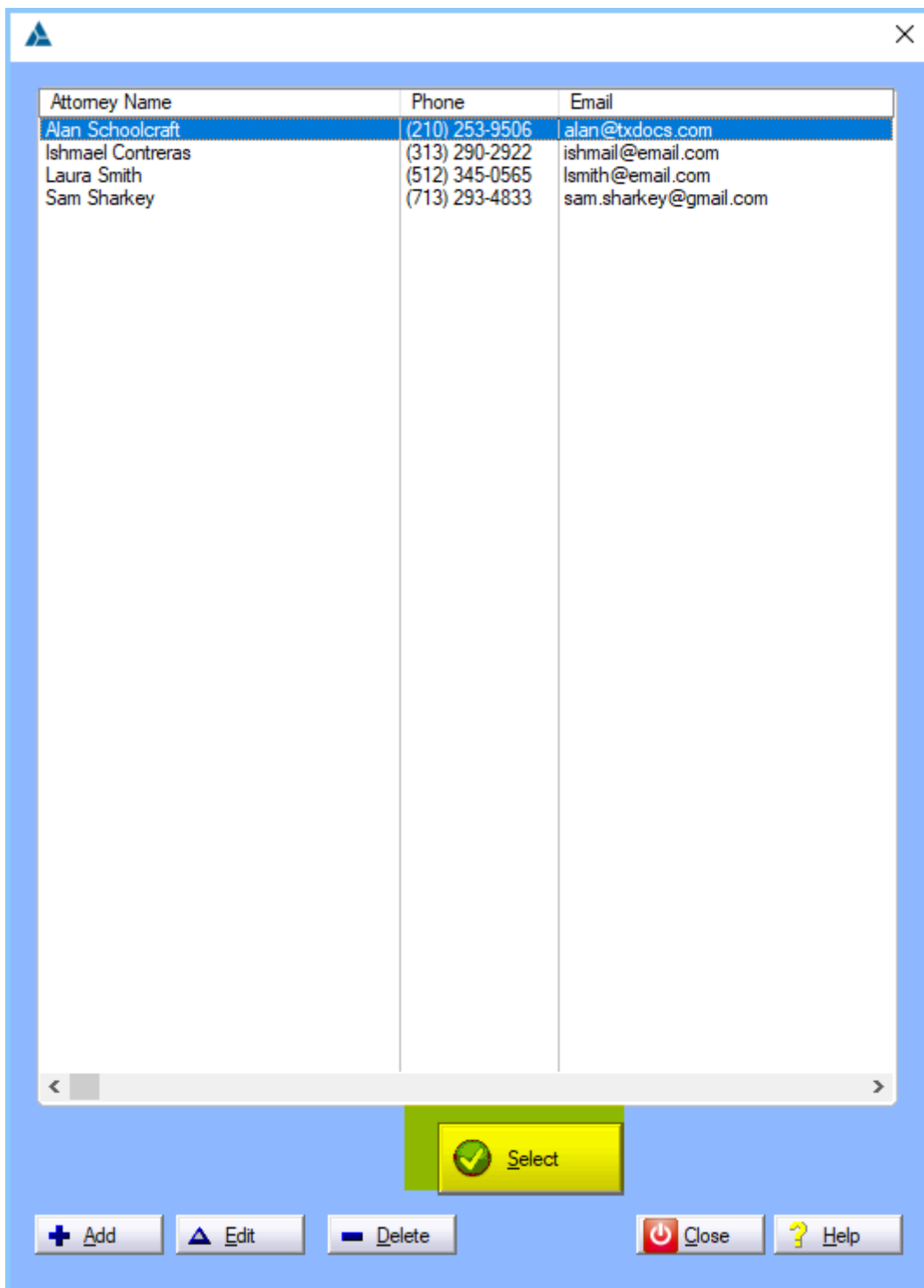
4.3   Email to attorneys

TXdocs' Mediator includes two emails that can be generated and sent to attorneys. You can change the text of these emails, but their primary purpose is to give the case attorneys the information they need to upload the case data to you.

1. The "Initial email" can be sent as you are creating a new case. On the New Case window, there is a checkbox that tells Mediator you want to send this email. This checkbox is enabled after you select at least one attorney for the case.

2. After you click "OK", the Initial Email window will open. The text of the email as well as the attachments to include can be predefined by you in setup 10. You can also edit the text of the email right here. If you have not selected Petitioner's attorney or Respondent's attorney, then that section of the window will be disabled.

3. If you click one of the "Preview" buttons, you will be able to see what the email will look like when the attorneys receive it.

EmailPreview ✕

This email is automatically generated by TXdocs' Mediator software.

You are scheduled for mediation on September 20, 2018   .

If you subscribe to TXdocs,, you can save time and money by uploading the inventory and other information from TXdocs to me. Call TXdocs at (210) 253-9506 for information about this feature.

Mediator ID: TX0
Upload code: XM5KJJR9

Alan Schoolcraft
Attorney/President
TXdocs

⏻ Close

4. The other email is similar to the Initial Email except it would be sent by you if an attorney asks you to re-send the upload information. To send this email, open the Case Manager and click on the "Attorney data upload" tab. On that tab you can click on a button to re-send the information to either attorney.

4.4   Attorneys contact information

When you enter attorneys into Mediator, you are only required to enter their name and email address. But, if you will take the time to also enter their phone number and address, you will have a convenient way to look up their contact information. Here's how you can look up their information:

1. Click the "Attorneys" item on Mediator's main menu.
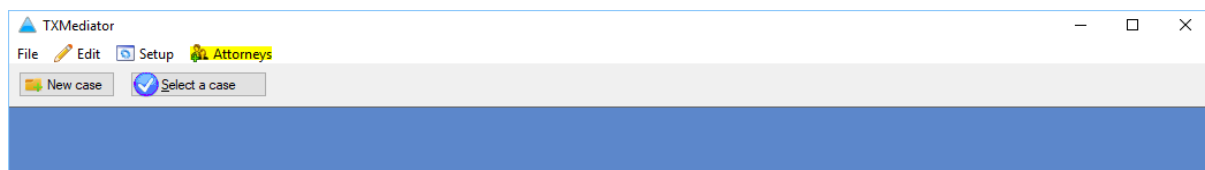
2. After you click Attorneys, the attorneys list will open. You can see the attorney's name, phone number and email address in the list. You can also click the "Edit" button to see the highlighted attorney's mailing address.
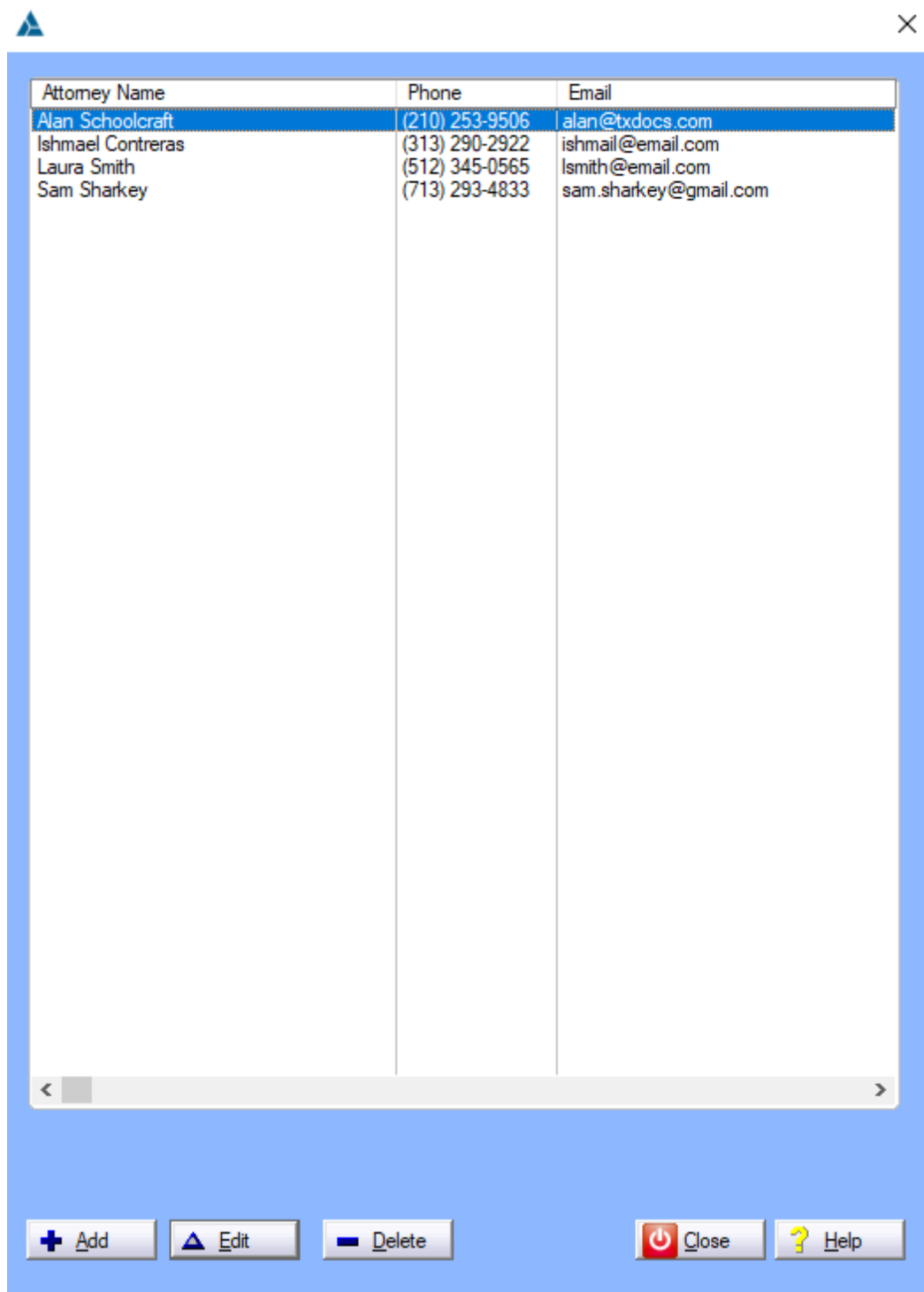
3. The other way to see an attorney's contact information is to click on the "View" button in Case Manager.

4.5   Attorney data upload

Perhaps the biggest time saver in TXdocs' Mediator is the ability to have an attorney upload all of the asset and liability information directly into your case file.   Since the attorney has to enter all of this information anyway when preparing an inventory, it's virtually no effort to share that information with you. The only thing you have to do to enable the attorneys to do this is to let Mediator send the attorney an email with the credentials they will need to upload. You can tell Mediator to do this in two places.

1. When you create a new case, check the box on the form that says "Send introductory email to attorneys". That email will include the upload credentials.

2. The second way to send this information to an attorney is located in the "Attorney data upload" tab in the Case Manager. Simply click one of the buttons to send the information.

Chapter 4 Assembling Documents

5   Chapter 4 Assembling Documents

5.1   Assembling documents

Before assembling your first document, you need to be sure that you have setup your name and the word processor you want to use. If you need to see how to setup those items, click here 10 .

1. To assemble a document, click on the "Assemble" item on the main menu. (This item will not be visible until after you select a case.) You can assemble a full Mediated Settlement Agreement or you can select just the body of the agreement or either of the attachments. These options are presented so that you can separately print different parts of the agreement to review during the progress of the mediation. The last item on the drop down menu is "Case Notes". While working with the Property issues window, you can add a note for any of the items in the assets and liabilities list. This last menu item will let you print out those notes.
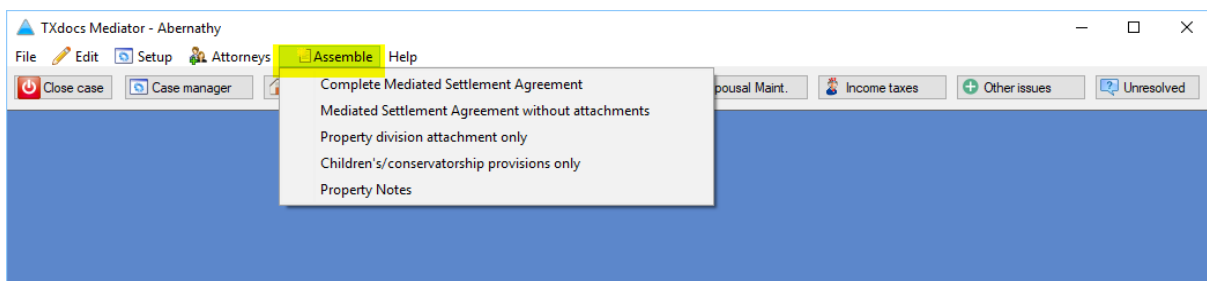
2. After you click on the document you want to assemble, you may see a window where you will provide some basic information for the caption of the document. These questions will only be asked once so, if you assemble another document you will not see any questions you previously answered.

After answering the questions, click the "Next" button.

3. After the document is assembled, you will see the Completed Documents window. Highlight the document and click "Download" to download the document to your computer.

NOTE: We highly recommend that you set up Mediator to work with Dropbox, Google Drive or Microsoft's One Drive. Mediator will work with any of these remote drives to automatically copy your completed document to your computer. Click here for information about setting up a remote drive.

5.2   Accessing your assembled documents

TXdocs Mediator is cloud based software. That means the software is running on an internet server instead of on your own computer.

HERE IS THE BIGGEST SOURCE OF CONFUSION FOR NEW USERS: Since the software is running on a remote internet server, that means any documents you assemble will be generated on our internet server instead of your computer. To edit the assembled document using your own Word or Word Perfect, you must first download the document to your computer.

Downloading a document is simply a matter of clicking the Download button after you assemble a document. The downside to this is, you lose the benefit of Mediator's document management capability. You will have moved your document out of our system and onto your computer. We will no longer be able to track it and keep it in a case folder for you.

ALTERNATIVES -

OpenOffice - OpenOffice Writer is a free word processor that comes with TXdocs Mediator. It is a full featured word processor, but we have found that most attorneys prefer to use Word or Word Perfect. If you click the "Open in OpenOffice" button, you can edit and print the document without bothering with either of the other Word Processors - and, you won't have to download the document first. It stays on our server and we can manage it for you. If you have not set up a word processor selection in Mediator, OpenOffice is your word processor by default.

One Drive, Google Drive and DropBox: These products (called remote drives) all provide a way to automatically synchronize files between the cloud and your computer and Mediator integrates with all of them. If you have one of these products setup on your computer, Mediator will be able to automatically synchronize your assembled documents with your own computer. We will even be able to create and maintain an organized system where documents for each case are stored in separate folder that case. All of these products have free versions and our tech support can help you get set up to use them in Mediator. For information on setting up a remote drive click here.

MICROSOFT'S OFFICE 365 ProPlus: This product from Microsoft gives you the complete Office suite (Word, Excel, Outlook, etc.) both online and on your own computer. This is absolutely the easiest way to use the cloud for all your computing needs. Mediator's integration with OneDrive and Office 365 makes document assembly in the cloud as seamless as it is using the old desktop technology.

Office 365 ProPlus is a Microsoft product and you order from them. The cost is $12/month. You will need to purchase this product before our tech support can help you get it set up in TXdocs. (NOTE: You want Office 365 **ProPlus** and not the standard Office 365.)

OUR RECOMMENDATION - As a minimum, you should setup a remote drive. If you have not already set up one of them, we recommend Microsoft's OneDrive. If you really want to use cloud computing to its maximum potential, we recommend that you subscribe to Microsoft's Office365 ProPlus. Our tech support will be happy to help if you have any questions.

Visit Microsoft's Office365 website

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Uploading data from attorneys   44, 50

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Word processor selection   10