

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 facilitate 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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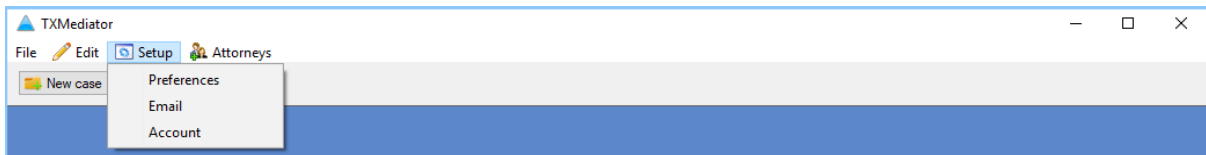
Chapter 1 Getting Started

2 Chapter 1 Getting Started

2.1 Initial Setup

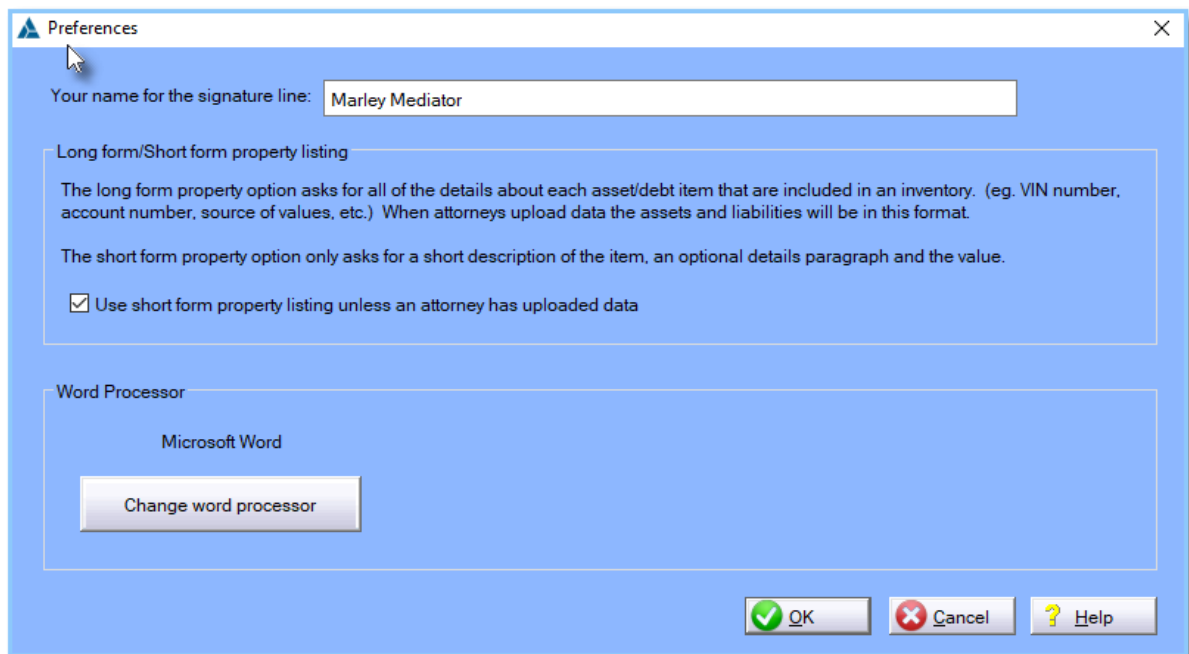
The first thing you want to do is set up Mediator to work the way you want it to work.

1. Click on Setup on the main menu.

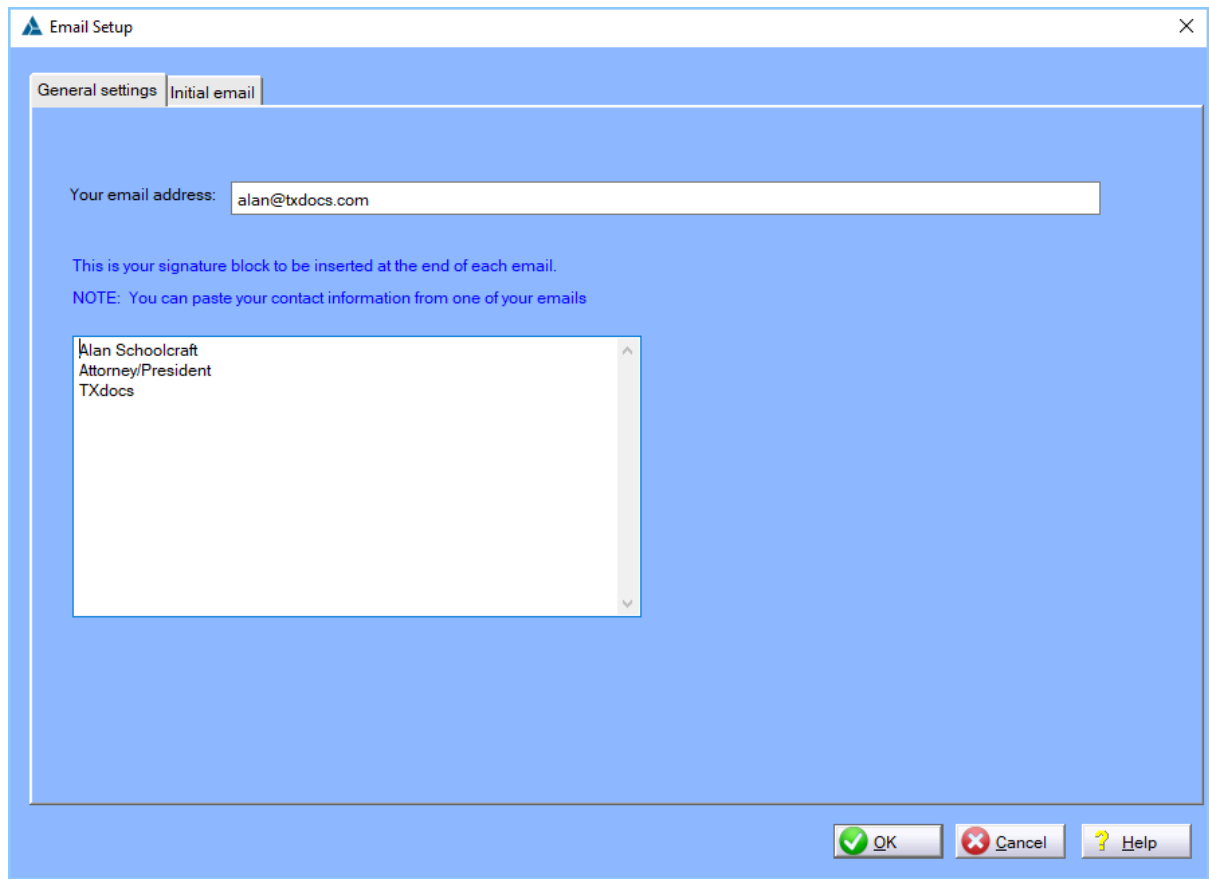


2. Select the preferences item on the setup menu to enter basic preferences. Enter your name as you want it to appear on signature lines and select whether you want to use Word or WordPerfect as your word processor.

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 Appraisal. 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.

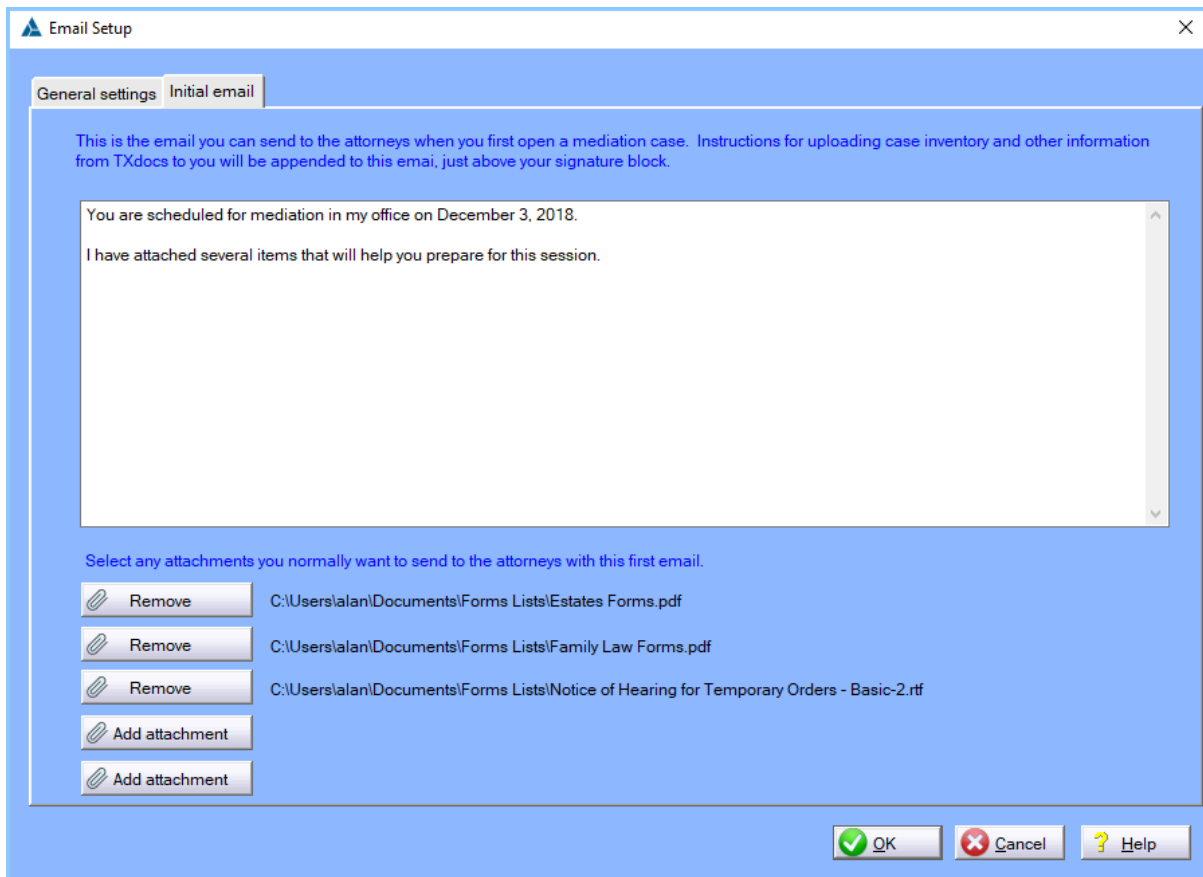


3. TXdocs' Mediator will automatically send a couple of emails to attorneys in the case. The Email Setup window is where you specify how you want these to look.



The image shows a screenshot of the 'Email Setup' dialog box, specifically the 'Initial email' tab. The dialog has a title bar with a close button (X). Below the title bar are two tabs: 'General settings' and 'Initial email'. The 'Initial email' tab is active. It contains a text field for 'Your email address:' with the value 'alan@txdocs.com'. Below this is a blue instruction text: 'This is your signature block to be inserted at the end of each email.' followed by a blue note: 'NOTE: You can paste your contact information from one of your emails'. Below the note is a text area containing the signature: 'Alan Schoolcraft', 'Attorney/President', and 'TXdocs'. At the bottom right of the dialog are three buttons: 'OK' (with a green checkmark icon), 'Cancel' (with a red X icon), and 'Help' (with a yellow question mark icon).

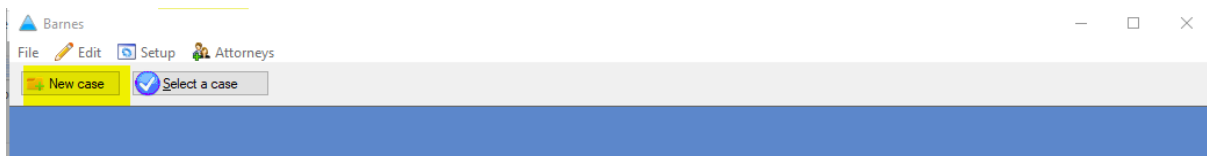
The second tab for email setup is where you can enter the text of the initial email TXdocs will send to the attorneys. In addition to the text of the email, TXdocs will append the signature block you set up in the first tab as well as instructions on how to upload information from TXdocs to you. You 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.

Case Will Be Added

Case description: Johnson V Johnson (18 CI 29344)

Mediation Date: 11/15/18

☐ The parties are pro se

Petitioner's attorney: ☒ Select Laura Smith

Respondent's attorney: ☒ Select Sam Sharkey

☒ Send introductory email to attorneys

OK Cancel Help

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.

Initial Email

From: alan@txdocs.com

Petitioner's Attorney

To: sam.sharkey@gmail.com

This email is automatically generated by TXdocs' Mediator software.

You are scheduled for mediation on September 20, 2018 .

THE FOLLOWING WILL BE INSERTED ABOVE YOUR NAME: "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: XM5KJR9

YOUR NAME AND CONTACT INFO WILL BE INSERTED HERE. Go to Setup/Email to fill-in how you want your signature block shown.

Respondent's Attorney

To: sam.sharkey@gmail.com

This email is automatically generated by TXdocs' Mediator software.

You are scheduled for mediation on September 20, 2018 .

THE FOLLOWING WILL BE INSERTED ABOVE YOUR NAME: "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: R4EUHQKA

YOUR NAME AND CONTACT INFO WILL BE INSERTED HERE. Go to Setup/Email to fill-in how you want your signature block shown.

C:\Users\alan\Documents\Firms Lists\Estates Forms.pdf

C:\Users\alan\Documents\Firms Lists\Family Law Forms.pdf

C:\Users\alan\Documents\Firms Lists\Temporary Orders - Basic-2.rtf

☒ Email copies to yourself

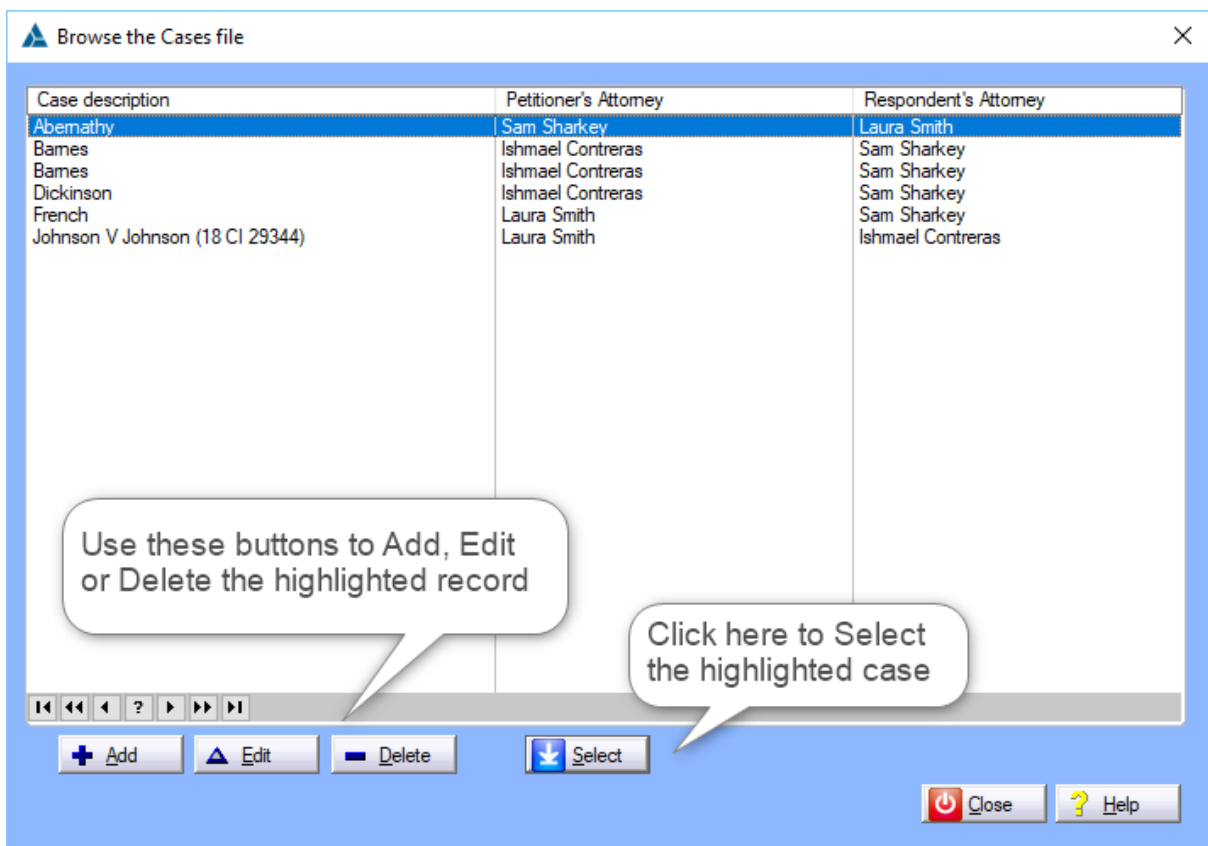
Close Help

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.



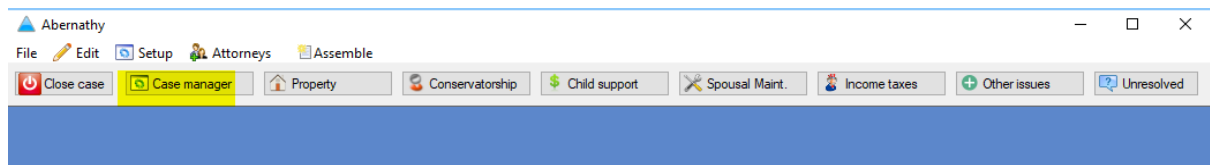
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Chapter 2 Using Mediator

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.

Case Manager

Mediation date: 9/20/18

Petitioner's attorney: View Select Sam Sharkey

Respondent's attorney: View Select Laura Smith

☐ Use short form property listing

Parties & Issues Documents Attorney data upload

☐ A divorce proceeding has not yet been filed

☐ The parties are pro se

Parties

Petitioner name: Andy Abemathy

Respondent name: Annie Abemathy

Children

Name

Andrew J. Abemathy

Sharon Abemathy

+ Add Edit Delete

Issues

☒ Property ☒ Conservatorship ☒ Child support ☒ Spousal maintenance ☒ Income taxes

Unresolved issues

☒ This is a partial settlement and there are unresolved issues remaining

(NOTE: This will show an "Unresolved" issues button on the toolbar for you to list the unresolved issues.)

OK Cancel Help

Callouts:

- You can edit the Mediation date and select or view attorney contact information here.
- Uncheck this to use the long form property listing in this case.
- If a proceeding is not filed yet the MSA will be assembled with no caption.
- Select the main issues to be mediated.

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.

Parties & Issues Documents

☒ A divorce proceeding has not yet been filed

☒ The parties are pro se

Parties

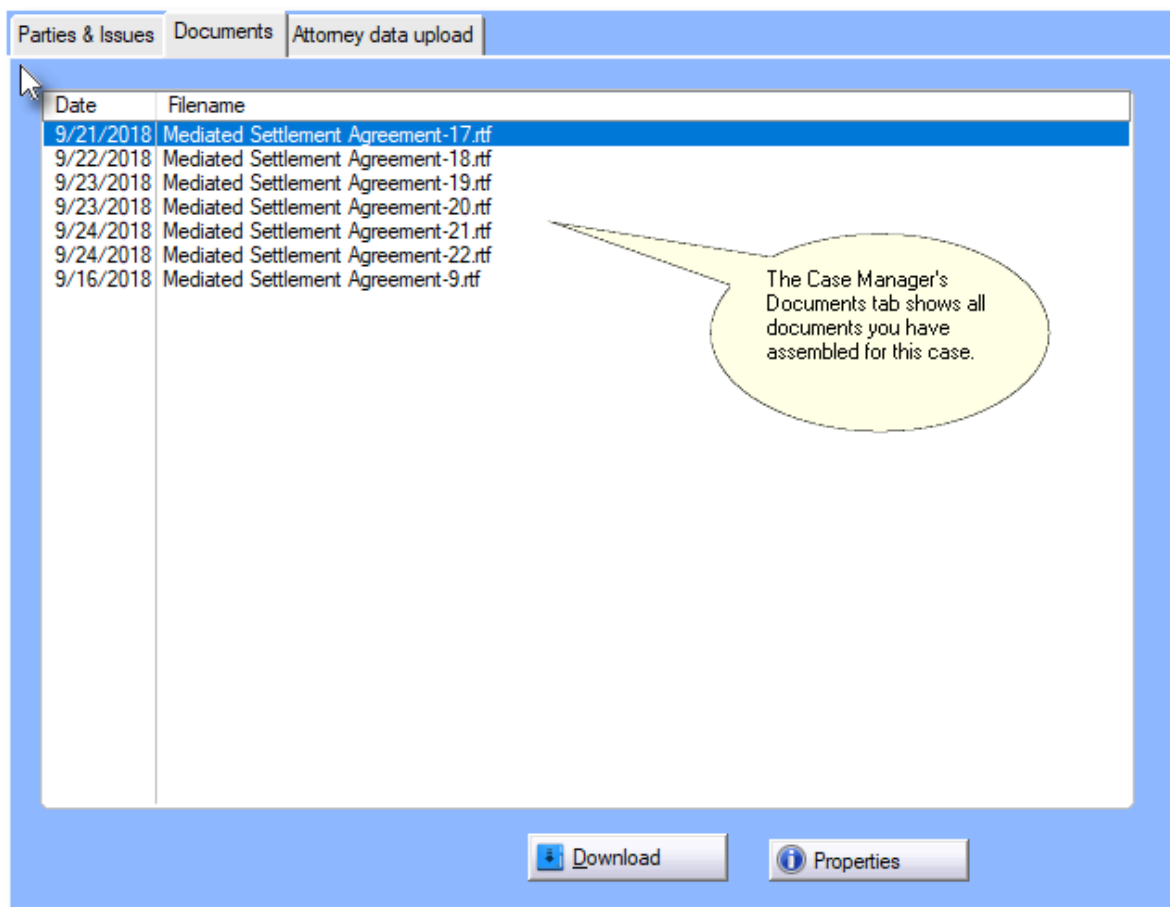
Petitioner name: Andy Abemathy Label: Husband

Respondent name: Annie Abemathy Label: Wife

Callout:

- Alternate labels for the parties.

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 Appraisalment. 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 instead enter everything using Mediator's short form, you can check "Use short form inventory anyway (ignore uploaded data)"

The screenshot shows the 'Attorney data upload' tab in the Mediator software. The interface is light blue with a white header bar containing three tabs: 'Parties & Issues', 'Documents', and 'Attorney data upload'. Below the tabs, there are three buttons, each with a document icon and a blue arrow:

- Send introductory email to attorneys
- Email upload instructions to Petitioner's attorney
- Email upload instructions to Respondent's attorney

Below these buttons is a section titled 'Manage uploaded data' with a light blue background. It contains the following text:

If a party uploaded incomplete or empty data you can delete that data to allow a new upload or you simply ignore the uploaded data and use the short form inventory instead.

There is a checkbox labeled 'Use short form inventory anyway (ignore uploaded items)' which is currently unchecked. Below this is a button labeled 'Delete uploaded data to allow a new upload'.

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.

Property Division

Community property | Husband's separate estate | **Wife's separate estate**

Enter separate estate assets and liabilities on these tabs

Award a cash equalization payment here

Totals | Notes/Custom provisions

Property issues are resolved

Community estate		Assets	Debts
Unawarded:		4,844.00	0.00
To Husband:		2,986,282.00	566,457.56
To Wife:		2,160,274.00	154,872.00
Total:		5,151,400.00	721,329.56

Equalization Payment

☐ None
☒ Husband to Wife
☐ Wife to Husband

Amount: 0.00

Terms of payment

NET TOTALS

Net to Husband:	2,419,824.44	54.7 %
Net to Wife:	2,005,402.00	45.3 %

Save and Close Cancel Help

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.

Property Division

Community property		Husband's separate estate	Wife's separate estate	Awarded to/Paid by				N
		Amount	No Award	Husba	Wife	Other	Sell	
ASSETS								
Household Items in Possession of Petitioner								
	Miscellaneous household items	3,848.00		✓				
Household Items in Possession of Respondent								
	Miscellaneous household items	868.00			✓			
Motor Vehicles, Boats, Airplanes, etc.								
	2013 Ford F150	4,844.00					✓	
	Vehicle loan - GECU	2,367.00				✓		
	2016 Chrysler 300	7,899.00		✓				
Real Estate								
	Property at 106 Winn				✓			
	Mortgage payable to Randolph Brooks FCU				✓			
	Debt payable to Builder Bob				✓			
	Property at 225 Scott	160,000.00		✓				

Double click on the description or on the amount to edit it right here 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.

Property Division

Community property

Husband's separate estate

Wife's separate estate

Note tab

☐ Property issues are resolved

	Amount	No Award	Awarded to/Paid by			Note
			Husba	Wife	Other	
ASSETS						
Household Items in Possession of Petitioner						
Miscellaneous household items	3,848.00			✓		
Household Items in Possession of Respondent						
Miscellaneous household items	868.00			✓		
Motor Vehicles, Boats, Airplanes, etc.						
2013 Ford F150						✓
Vehicle loan - GECU					✓	
2016 Chrysler 300						✓
Vehicle loan - First Federal Savings	3,573.00					
Real Estate						
Property at 106 Winn	120,000.00			✓		✎
Mortgage payable to Randolph Brooks FCU	69,485.00			✓		
Debt payable to Builder Bob	48,500.00			✓		
Property at 225 Scott	160,000.00			✓		
Mortgage payable to First Federal	34,520.00			✓		
Debt payable to Renaissance Remodeling	5,623.00			✓		
Mineral Interests						

Icon shows this item has a note

Totals

Notes/Custom provisions

Note

This is something very important I need to remember about the property at 106 Winn Avenue.

Custom award provision

This is a custom provision

Save and Close

Cancel

Help

Short Form Property listing

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 Appraisal 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 liability 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.

The screenshot displays the 'Property Division' window with the 'Community property' tab selected. The main table lists categories for ASSETS, DEBTS, and RETIREMENT. The 'Real Estate' category under ASSETS is highlighted. A pop-up window titled 'Real Estate' is open, showing fields for 'Description', 'Details', and 'Value: \$ 0.00'. The background window also shows a 'Totals' section with 'Community estate' and 'Equalization Payment' options.

	Amount	No Award	Awarded to/Paid by				Note
			Pet	Resp	Other	Sell	
ASSETS							
Household items in possession of Petitioner							
Household items in possession of Respondent							
Real Estate							
Vehicles							
Investments							
Other property							
DEBTS							
Credit cards							
Other unsecured debts							
Secured debt							
RETIREMENT							
Retirement account/benefit							

Totals

	Assets	Debts
Unawarded:	0.00	0.00
To Petitioner:	0.00	0.00
To Respondent:	0.00	0.00
Total:	0.00	0.00

Equalization Payment

☐ None
☐ Petitioner to Respondent
☐ Respondent to Petitioner

Real Estate Pop-up Window

Description:

Details:

Value: \$

Buttons: OK, Cancel, Help

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.

Conservatorship Issues

Options

Conservatorship issues are resolved

Conservators

☐ Provide for "split custody" (children divided between the parents)

Type of conservatorship: ☐ Joint managing ☒ Sole managing w/ possessory conservatorship

Sole managing conservator:

Which party is the father:

Possession dates and times

☐ Check here if you want to specify NON-STANDARD DATES/TIMES for beginning and/or ending possession periods

Possession periods will start at: ☐ 6 p.m. ☒ Time school is dismissed

Possession periods (excluding weekdays) will end at: ☒ 6 p.m. day before school resumes ☐ Time school resumes

Weekday possession periods will end at: ☒ 8 p.m. ☐ Time school resumes

Optional provisions

☐ Require the non-primary conservator to RETURN CHILD(REN) to their primary residence at the end of each possession

☐ Conservators currently live OVER 100 MILES apart

☒ Possessory conservator elects possession one weekend per month instead of 1st, 3rd & 5th

☐ Include possession provisions for a CHILD UNDER 3 years old

☐ Designate which party will file TAX RETURNS for the children Party responsible:

☐ Include provisions about child(ren)'s TRAVEL ARRANGEMENTS

☐ Include requirement to participate in a co-parenting website

☐ Include provisions giving the primary conservator CONTROL OVER CHILDREN'S PROPERTY

☐ Include JEWISH HOLIDAYS in the order

OK Cancel Help

As you select items on this tab, additional tabs will appear across the top. You will provide additional details on those tabs.

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.

Conservatorship Issues

Options | Children's property | Travel Provisions | Weekends/Days/Mother/Father | Holidays/Summers | Jewish 1 | Jewish 2

☒ Conservatorship issues are resolved

Conservators

☐ Provide for "split custody" (children divided between the parents)

Type of conservatorship: ☐ Joint managing ☒ Sole managing w/ possessory conservator

Sole managing conservator:

Possession dates and times

☒ Check here if you want to specify NON-STANDARD DATES/TIMES for beginning and/or ending possession periods

Possession periods will start at: ☒ 6 p.m. ☐ Time school is dismissed

Possession periods (excluding weekdays) will end at: ☒ 6 p.m. day before school resumes ☐ Time school resumes

Weekday possession periods will end at: ☒ 8 p.m. ☐ Time school resumes

Optional provisions

☒ Require the non-primary conservator to RETURN CHILD(REN) to their primary residence at the end of each possession

☒ Conservators currently live OVER 100 MILES apart

☒ Possessory conservator elects possession one weekend per month instead of 1st, 3rd & 5th

☒ Include possession provisions for a CHILD UNDER 3 years old

☐ Designate which party will file TAX RETURNS for the children Party responsible:

☒ Include provisions about child(ren)'s TRAVEL ARRANGEMENTS

☐ Include requirement to participate in a co-parenting website

☒ Include provisions giving the primary conservator CONTROL OVER CHILDREN'S PROPERTY

☒ Include JEWISH HOLIDAYS in the order

OK Cancel Help

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.

Conservatorship Issues

Options | Split Custody | Children's property | Travel Provisions | Weekends/Days/Mother/Father | Holidays/Summers | Jewish 1 | Jewish 2

☐ Conservatorship issues are resolved

Conservators

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.

Conservatorship Issues

Options Split Custody

Conservatorship issues are resolved

Select the Children who will reside with each party

Child	Petitioner	Respondent
Andrew J. Abemathy	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sharon Abemathy	<input type="checkbox"/>	<input type="checkbox"/>

Children are added to the case in Case Manager. Here, you only select which children reside with which parent.

Select the rights that each parent has with respect to the child(ren) for whom the parent has the right to establish residence. (for the child(ren) living with that parent)

Click the down arrow to select the rights for each conservator.

Rights of Andy Abemathy

Consent to medical, dental and surgical treatment Exclusive

Consent to psychiatric and psychological treatment Exclusive

Receive child support Joint

Represent the children in legal actions and decisions Independent

Consent to marriage or enlistment None

Make decisions regarding education Exclusive

Services and earnings of the children Exclusive

Act as agent for children's estate before government Exclusive

Manage children's estate Exclusive

Rights of Annie Abemathy

Consent to medical, dental and surgical treatment Exclusive

Consent to psychiatric and psychological treatment Exclusive

Receive child support Exclusive

Represent the children in legal actions and decisions Exclusive

Consent to marriage or enlistment Exclusive

Make decisions regarding education Exclusive

Services and earnings of the children Exclusive

Act as agent for children's estate before government Exclusive

Manage children's estate Exclusive

OK Cancel Help

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.

Conservatorship Issues

Options Split Custody Children's property Travel Provisions Weekends/Fathers/Mothers Holidays/Summers Jewish 1 Jewish 2

Conservatorship issues are resolved

The following property shall be solely controlled and managed by Andy Abemathy

The following property shall be solely controlled and managed by Annie Abemathy

OK Cancel Help

Travel Provisions

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

The screenshot shows a software window titled "Conservatorship Issues" with a close button (X) in the top right corner. Below the title bar are three tabs: "Options", "Split Custody", and "Travel Provisions", with "Travel Provisions" being the active tab. In the top right of the main area, there is a checkbox labeled "Conservatorship issues are resolved". The section is titled "Travel Arrangements" and contains a paragraph: "In addition to general provisions such as describing the parties' responsibility to get the children to the airport, provide notice to the other party, etc., these specific provisions can be included." Below this are three checked checkboxes with associated controls: 1. "Specify minimum age for a child traveling alone" with a "Minimum age:" label and a spinner box set to "12". 2. "Designate who will make travel arrangements" with a "Select:" label and a dropdown menu showing "Primary conservator". 3. "Designate who will pay for travel expenses" with a "Select:" label and an empty dropdown menu. At the bottom of this section is a label "Number of days before travel notice of arrangements must be given:" followed by a spinner box set to "30". At the bottom right of the window are three buttons: "OK" (with a green checkmark icon), "Cancel" (with a red X icon), and "Help" (with a yellow question mark icon).

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.

Conservatorship Issues

Options Split Custody Children's property Travel Provisions Weekends/Fathers/Mothers Holidays/Summers Jewish 1 Jewish 2

☐ Conservatorship issues are resolved

Normal Weekends

During school term: Begin: Friday other time Time: End: Sunday 6PM Day & Time:

Outside of school term: Begin: Friday 6 p.m. Time: End: Sunday 6PM Day & Time:

Weekends with FRIDAY holiday:

During school year: Begin: Thursday when school dismit Time: End: Thursday 6PM Day & Time:

Outside of school year: Begin: Thursday 6PM Time: End: Monday 6PM Day & Time:

Weekends with MONDAY holiday:

During school year: End: 6 PM Monday Day & Time:

Outside of school year: End: Monday 6PM Day & Time:

Father's Day

End: Day: Father's day at: 6PM Time:

Mother's Day

Begin: 6PM Friday before

End: 6PM Mother's day

Weekdays

Begin: When school is dismissed Time: End: 8 PM Day & Time:

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.

Conservatorship Issues

Options Split Custody Children's property Travel Provisions Weekends/Fathers/Mothers Holidays/Summers **Jewish 1** Jewish 2 ☐ Conservatorship issues are resolved

Thanksgiving

Begin: Day: Other day Day: at: Time school dismissed Time:
 End: Day: Sunday following Thanks Day: at: 6PM Time:

Christmas

Begin: Day: Day school dismissed Day: at: Time school dismissed Time:
 End: Day: December 28 Day: at: Noon Time:

Spring Break

Begin: Time school is dismissed Time:

Summer

☒ Specify beginning and ending dates for each year (each parent gets a single possession period normally totaling 30 days)
☐ With written notice by April 1, let the parties choose beginning and ending dates each year (for a single possession period totaling 21 days)

Possession times begin at: 6PM Time: and end at: 6PM Time:

First possession period begin day: June 5 End day: July 5
 Second possession period begin day: July 5 End day: August 5

NOTE: The conservators will alternate these possession periods. One year a party will have the first period and the next year he/she will have the second period.

OK Cancel

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.

Conservatorship Issues

Options Split Custody Children's property Travel Provisions Weekends/Fathers/Mothers Holidays/Summers Jewish 1 Jewish 2

☐ Conservatorship issues are resolved

Provide a description of the possession times for the holidays. Include the years, days, and times for beginning and ending possession for each Jewish conservator.
 Example: In odd-numbered years, [name of father] shall have possession beginning at 4 p.m. on the day before Rosh Hashanah begins and ending at 4 p.m. the following day. In even-numbered years, [name of mother] shall have possession beginning at 4 p.m. on the day before Rosh Hashanah begins and ending at 4 p.m. the following day.

☐ Rosh Hashanah

☐ Yom Kippur

☐ Sukkot

☐ Shemeni Atzeret

OK Cancel

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.

Child Support Provisions

Support obligation Optional provisions Medical support Dental support

Obligor: Annie Abernathy Obligee: Andy Abernathy

Payments

Frequency of support payments: ☒ Monthly ☐ Semi-monthly ☐ Weekly

Support per month: 974.28 [Child support calculator](#)

Day of month for each monthly payment:

Click this button to pop up a Child Support Calculator

Fill in the stepdown amount of child support as each child emancipates.

Support	# of children
974.28	2 children currently
779.43	1 child remaining

Use the "Child support calculator" button above to automatically calculate the stepdown amounts. Or, to edit the step down amounts manually, double click on the amount you want to change. After you make the change, press Enter to complete the edit. NOTE: You cannot change the amount in the first row. That is the current amount that is owed before the step down. You can change the amount currently owed in the payment field above.

Disabled child needing continued support

☒ none ☐ minor disabled child ☐ adult disabled child Name:

Variance from Child Support Guidelines

☐ Include a statement that the parties agree to an amount of child support that varies from the guidelines

Net resources of obligor: 3,897.13

Net resources of obligee: 0.00

Percentage applied to obligor's resources: 25

[Calculate net resources](#)

☐ Suspend income withholding order

☐ Require obligor to maintain life insurance Amount: 0.00

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.

TXdocs Mediator - Abernathy

File Edit Setup Attorneys Assemble Help

Child Support Provisions

Petitioner's obligation Respondent's obligation Optional provisions Medical support Dental support

Child support issues are resolved

(Each of these items are in addition to the other support)

☒ Parties will split daycare expenses

☒ Parties will split private school expenses

☒ Parties will split post secondary education expenses

☒ Parties will split cost of extracurricular activities (tutoring, private lessons, summer camp, field trips)

☒ Parties will obtain and split costs of automobiles for the child(ren)

Percentage split for the costs of any items selected above

Andy Abernathy 30 %

Annie Abernathy 70 %

Medical Support

Child Support Provisions [X]

Support obligation | Optional provisions | Medical support | Dental support

☐ Child support issues are resolved

How will health care coverage be provided to the child(ren):
☒ private health insurance ☐ military health care ☐ government program ☐ Cash medical support

Which party will provide the health care coverage: [v]
☐ Other party will reimburse for the cost of the insurance

Does this coverage already exist: ☒ coverage already exists ☐ coverage must be obtained

What is the monthly cost of the health care coverage: 0.00

Private insurance is available through:
☐ employment
☐ membership in a union
☐ membership in a trade association
☐ membership in another organization Name: []
☐ other private source Source: []

Allocation of unreimbursed medical expenses
 How will medical expenses not reimbursed by insurance or in excess of cash medical support be allocated between the parties (Sec. 154.183)

Andy Abemathy	50	%
Annie Abemathy	50	%

☒ The parties agree to waive the requirement to produce evidence of health care coverage

Dental Support

Child Support Provisions [X]

Support obligation | Optional provisions | Medical support | Dental support

☐ Child support issues are resolved

☐ There is no dental coverage available at a reasonable cost

Coverage status
☐ coverage already exists
☐ coverage must be obtained

Number of days to obtain coverage: 0 [v]
 Party to provide coverage: [v]

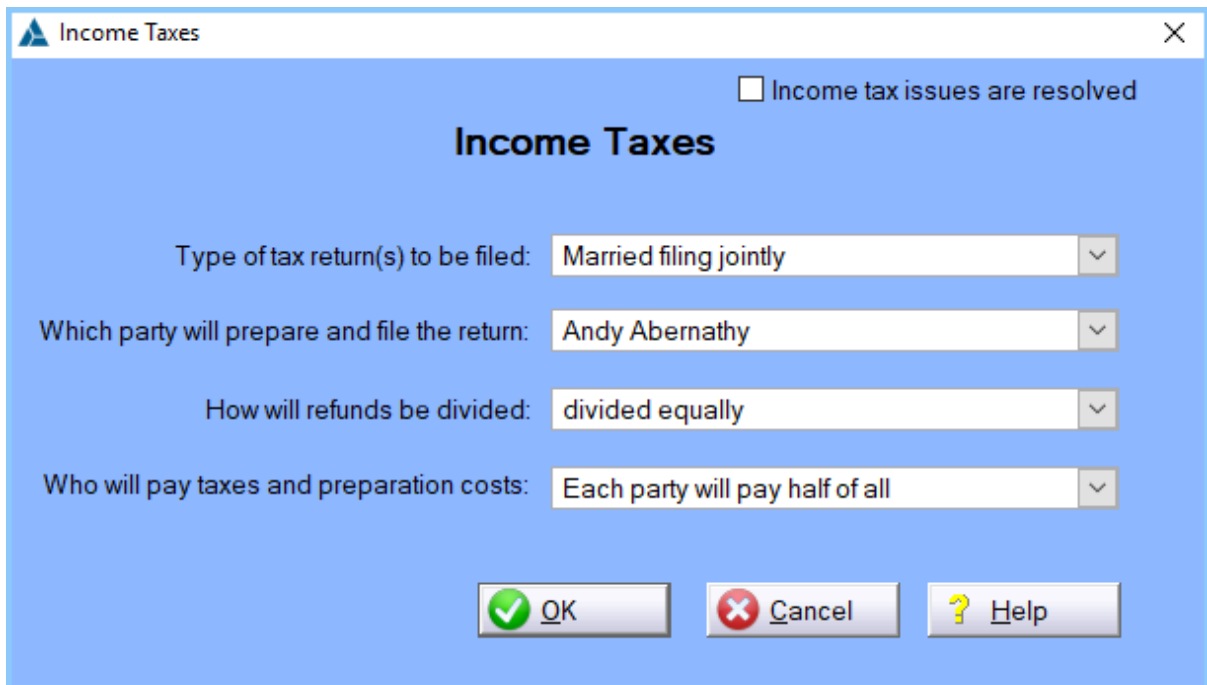
3.5 Spousal Maintenance

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.

The screenshot shows the 'Spousal Maintenance' window. At the top, there is a title bar with a close button (X). Below the title bar, the window has a blue background. The title 'Spousal Maintenance' is centered at the top. To the right of the title, there is a checkbox labeled 'Spousal maintenance issues are resolved'. Below the title, there are several input fields and checkboxes. The first input field is 'Party to pay spousal support:' with a dropdown menu showing 'Andy Abernathy'. Below it is 'Monthly amount:' with a text box containing '\$ 1,500.00'. Below that is 'Day of the month support is payable:' with a text box containing 'first'. Below that is 'How are payments to be made:' with a dropdown menu showing 'Payable directly to the spouse'. Below this is a note: 'NOTE: If withholding for spousal maintenance is agreed to, the agreement will include standard provisions concerning withholding, including the obligation to notify the Court and other party within 7 days if the employer's address changes.' Below the note is a checkbox labeled 'Include a statement that the maintenance is not to be construed as alimony'. Below that is a section titled 'Select when payment obligation ends:' with a blue link 'The earliest occurrence of one of the following events:'. Below this link are five checkboxes: 'A specified date' (checked), 'the death of either party' (checked), 'remarriage of the obligee' (checked), 'a court finding that obligee is cohabiting in a dating or romantic relationship' (unchecked), and 'some other event' (unchecked). The 'A specified date' checkbox has a 'Date:' field next to it containing 'December 31, 2023'. At the bottom right of the window are three buttons: 'OK' (green checkmark), 'Cancel' (red X), and 'Help' (yellow question mark).

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.

A screenshot of a software dialog box titled "Income Taxes". The dialog box has a blue background and a white title bar with a close button (X) in the top right corner. In the top right area of the dialog, there is a checkbox labeled "Income tax issues are resolved" which is currently unchecked. The main title "Income Taxes" is centered in a bold black font. Below the title, there are four rows of labels followed by dropdown menus:

- "Type of tax return(s) to be filed:" followed by a dropdown menu showing "Married filing jointly".
- "Which party will prepare and file the return:" followed by a dropdown menu showing "Andy Abernathy".
- "How will refunds be divided:" followed by a dropdown menu showing "divided equally".
- "Who will pay taxes and preparation costs:" followed by a dropdown menu showing "Each party will pay half of all".

At the bottom of the dialog box, there are three buttons: "OK" with a green checkmark icon, "Cancel" with a red X icon, and "Help" with a yellow question mark icon.

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.

Other Issues

Other issues have all been resolved

General | Credit cards

☒ Require disagreements about this agreement to be submitted to the mediator

☒ Include a mutual release

How will future disputes between the parties be resolved

☐ No reference to this in the agreement

☒ As provided in a collaborative law agreement between the parties

☐ Through mediation

☐ Through arbitration

Attorney's Fees and Costs

☒ Each party pays his/her own ☐ Other provision ☐ No reference to this in the agreement

The parties agree that

Other issues

Issue
<input checked="" type="checkbox"/> Is Respondent entitled to reimbursement for community funds expended on Ace Exterminating

+ Add ▲ Edit/View - Delete

Resolution

The parties agree that Ace Exterminating is community property to be divided with the community estate. Reimbursement is therefore not appropriate.

OK Cancel Help

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).

Other Issues

General Credit cards

☒ List credit cards Andy Abernathy is given exclusive use of
Cards: Citibank Mastercard ending in 7895, Discover card ending in 8950

☐ List credit cards Annie Abernathy is given exclusive use of
Cards:

☐ List credit cards the parties agree to destroy
Cards:

Check the box to enable the field for listing the cards

OK Cancel Help

3.8 Unresolved issues

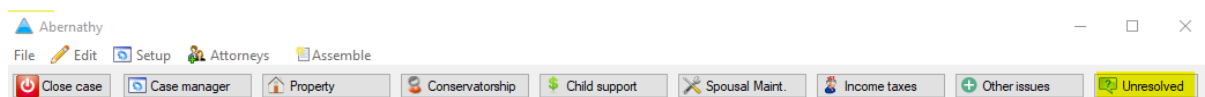
If there are any issues that are unresolved you can include a description of those issues in the completed MSA.

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

The screenshot shows the 'Case Manager' window with the following details:

- Mediation date:** 9/20/18
- Petitioner's attorney:** View (disabled), Select (checked), Sam Sharkey
- Respondent's attorney:** View (disabled), Select (checked), Laura Smith
- Tabs:** Parties & Issues (selected), Documents, Attorney data upload
- Checkboxes:**
 - ☐ A divorce proceeding has not yet been filed
 - ☐ The parties are pro se
- Parties:**
 - Petitioner name: Andy Abemathy
 - Respondent name: Annie Abemathy
- Children:**
 - Name: Andrew J. Abemathy, Sharon Abemathy
 - + Add, ▲ Edit
- Issues:**
 - ☒ Property
 - ☒ Conservatorship
 - ☒ Child support
 - ☒ Spousal maintenance
 - ☒ Income taxes
- Unresolved issues:**
 - ☒ This is a partial settlement and there are unresolved issues remaining
 - (NOTE: This will show an "Unresolved" issues button on the toolbar for you to list the unresolved issues.)
- Callout box:** Check this box to include unresolved issues. (Points to the 'Unresolved issues' checkbox)
- Buttons:** OK, Cancel, Help

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.

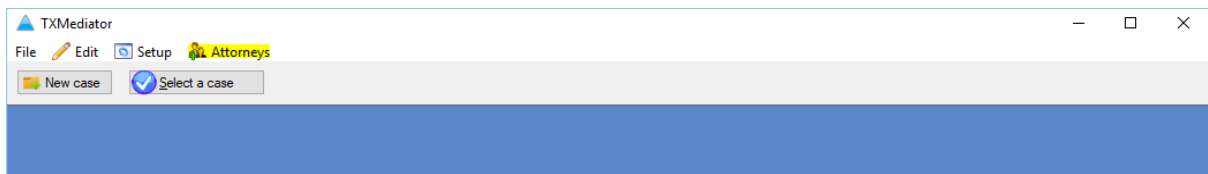
Chapter 3 Working with attorneys

4 Chapter 3 Working with attorneys

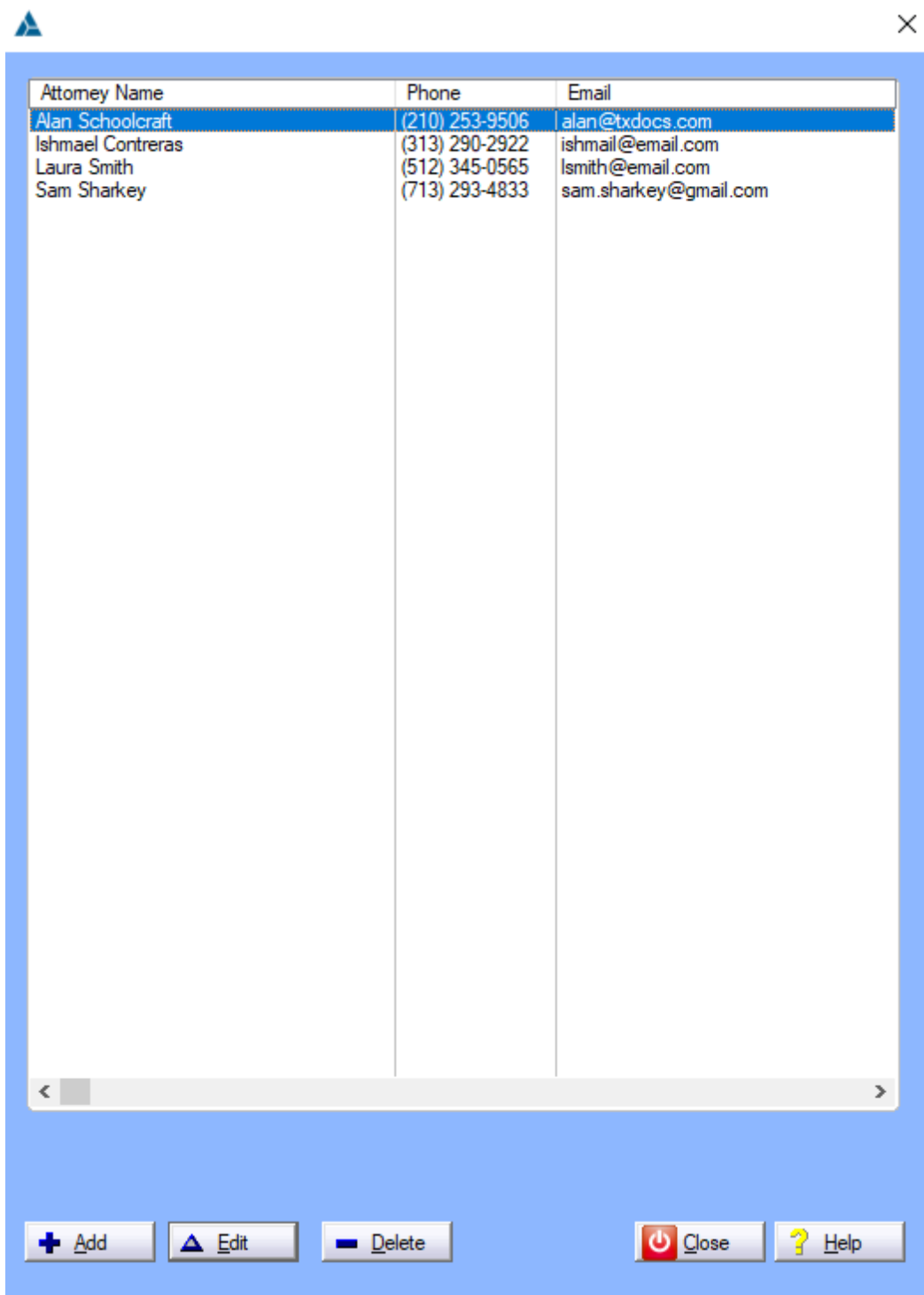
4.1 Attorneys List

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.



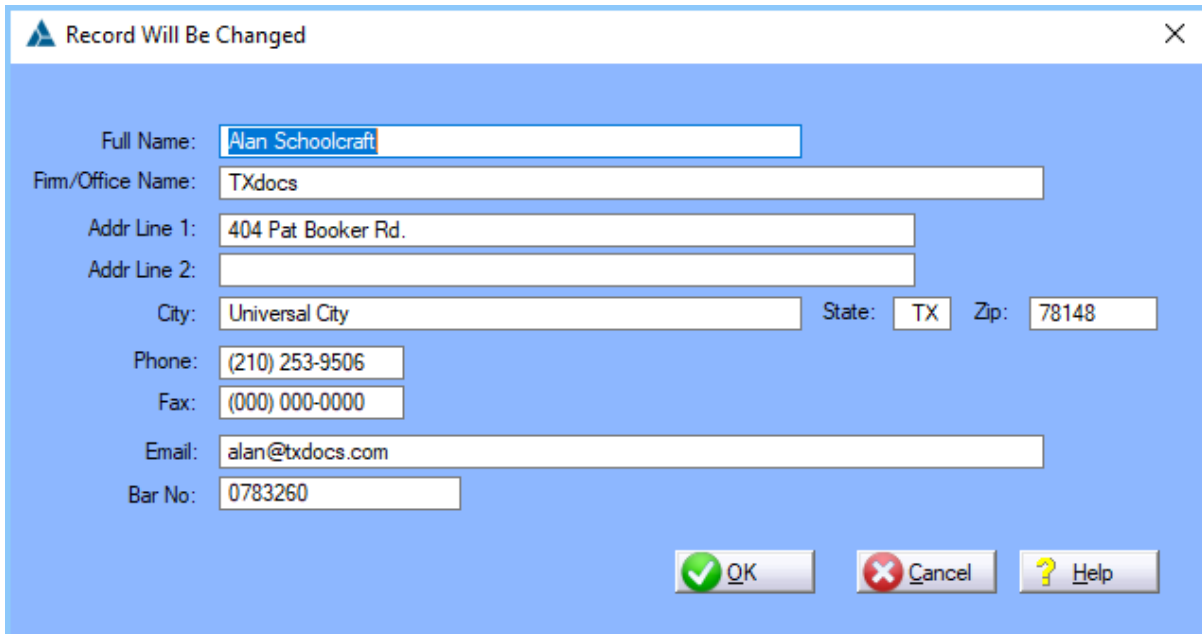
2. After the Attorneys List window opens, click on the Add or Edit buttons to add an attorney or to edit an attorney's information.



The screenshot shows a window titled "TXdocs Mediator" with a close button (X) in the top right corner. The window contains a table with three columns: "Attorney Name", "Phone", and "Email". The table lists four attorneys: Alan Schoolcraft, Ishmael Contreras, Laura Smith, and Sam Sharkey. The first row, "Alan Schoolcraft", is highlighted in blue. Below the table is a horizontal scrollbar. At the bottom of the window, there are five buttons: "Add" (with a plus icon), "Edit" (with a triangle icon), "Delete" (with a minus icon), "Close" (with a power icon), and "Help" (with a question mark icon).

Attorney Name	Phone	Email
Alan Schoolcraft	(210) 253-9506	alan@txdocs.com
Ishmael Contreras	(313) 290-2922	ishmail@email.com
Laura Smith	(512) 345-0565	lsmith@email.com
Sam Sharkey	(713) 293-4833	sam.sharkey@gmail.com

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



A dialog box titled "Record Will Be Changed" with a close button (X) in the top right corner. The dialog contains several text input fields for attorney information:

- Full Name: Alan Schoolcraft
- Firm/Office Name: TXdocs
- Addr Line 1: 404 Pat Booker Rd.
- Addr Line 2: (empty)
- City: Universal City
- State: TX
- Zip: 78148
- Phone: (210) 253-9506
- Fax: (000) 000-0000
- Email: alan@txdocs.com
- Bar No: 0783260

At the bottom right, there are three buttons: "OK" (with a green checkmark icon), "Cancel" (with a red X icon), and "Help" (with a yellow question mark icon).

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.

Case Will Be Added

Case description: Smithson v. Smithson

Mediation Date: 11/02/18

☐ The parties are pro se

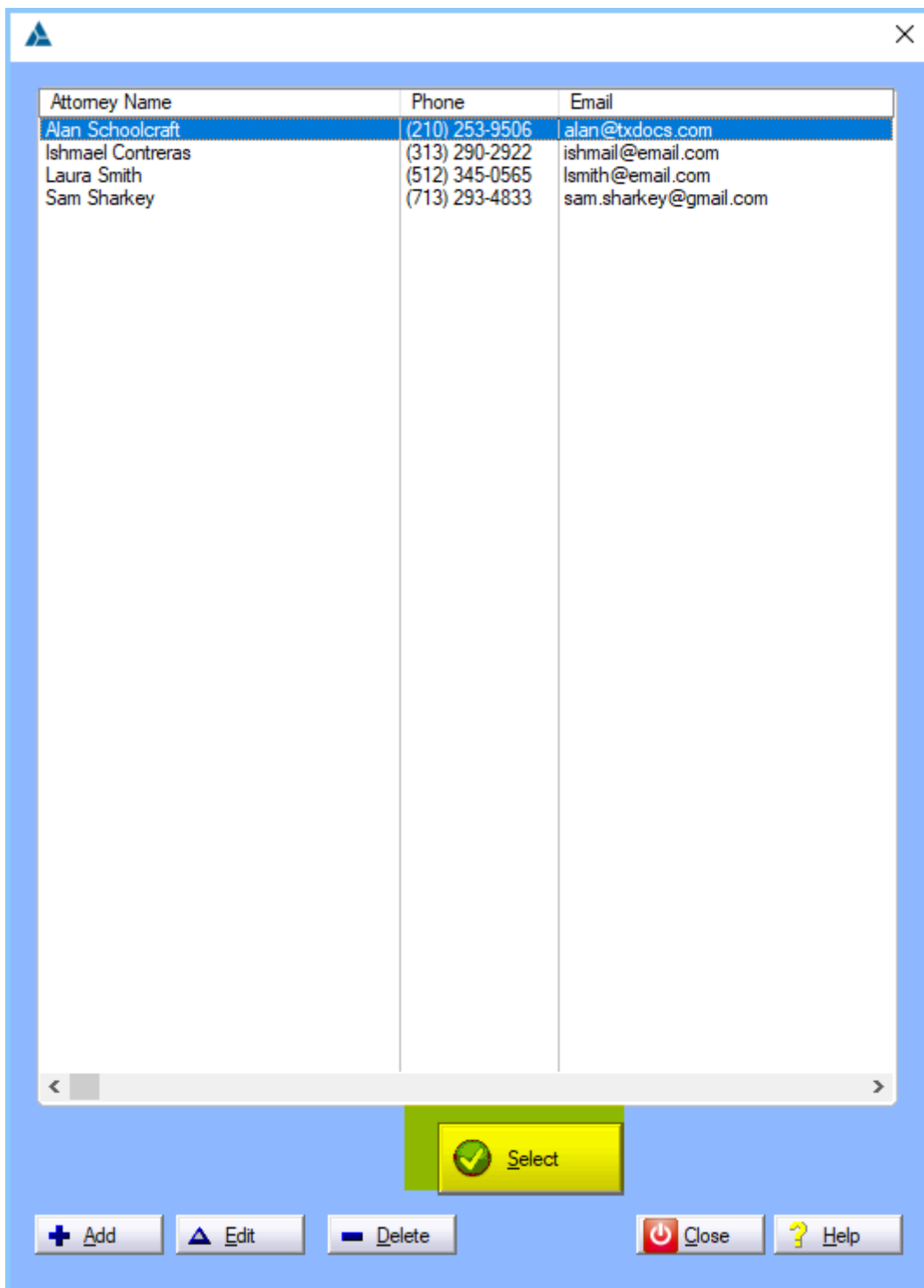
Petitioner's attorney: Select

Respondent's attorney: Select

☐ Send introductory email to attorneys

OK Cancel Help

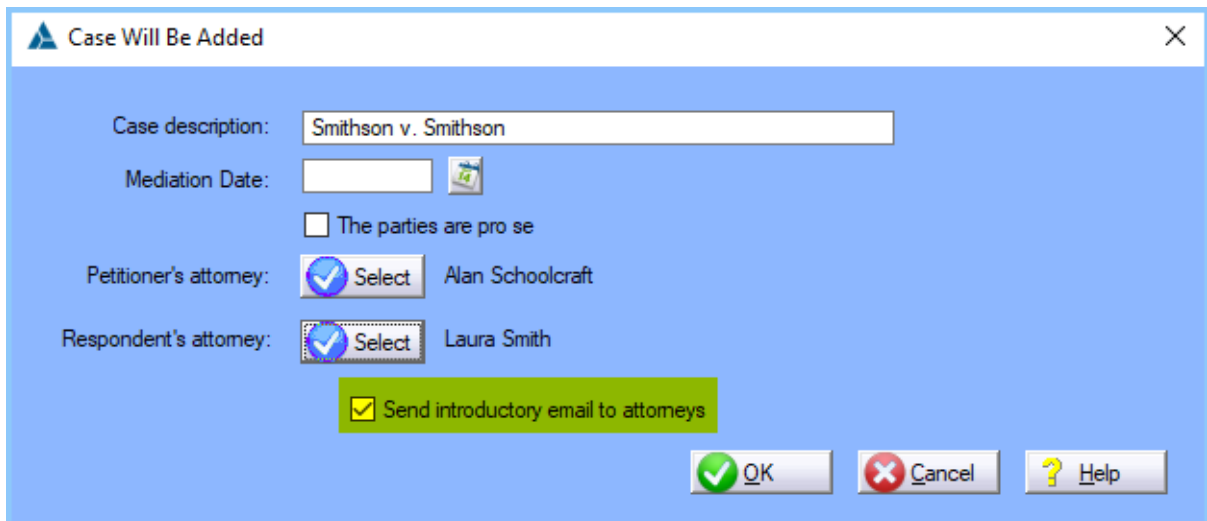
3. When you click on Select, the Attorneys List window opens. But, there is now a "Select" button available on that window. If the attorney you need is already in the list, simply highlight the attorney and click Select. Otherwise, use the "Add" button to add the attorney to your list.



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.



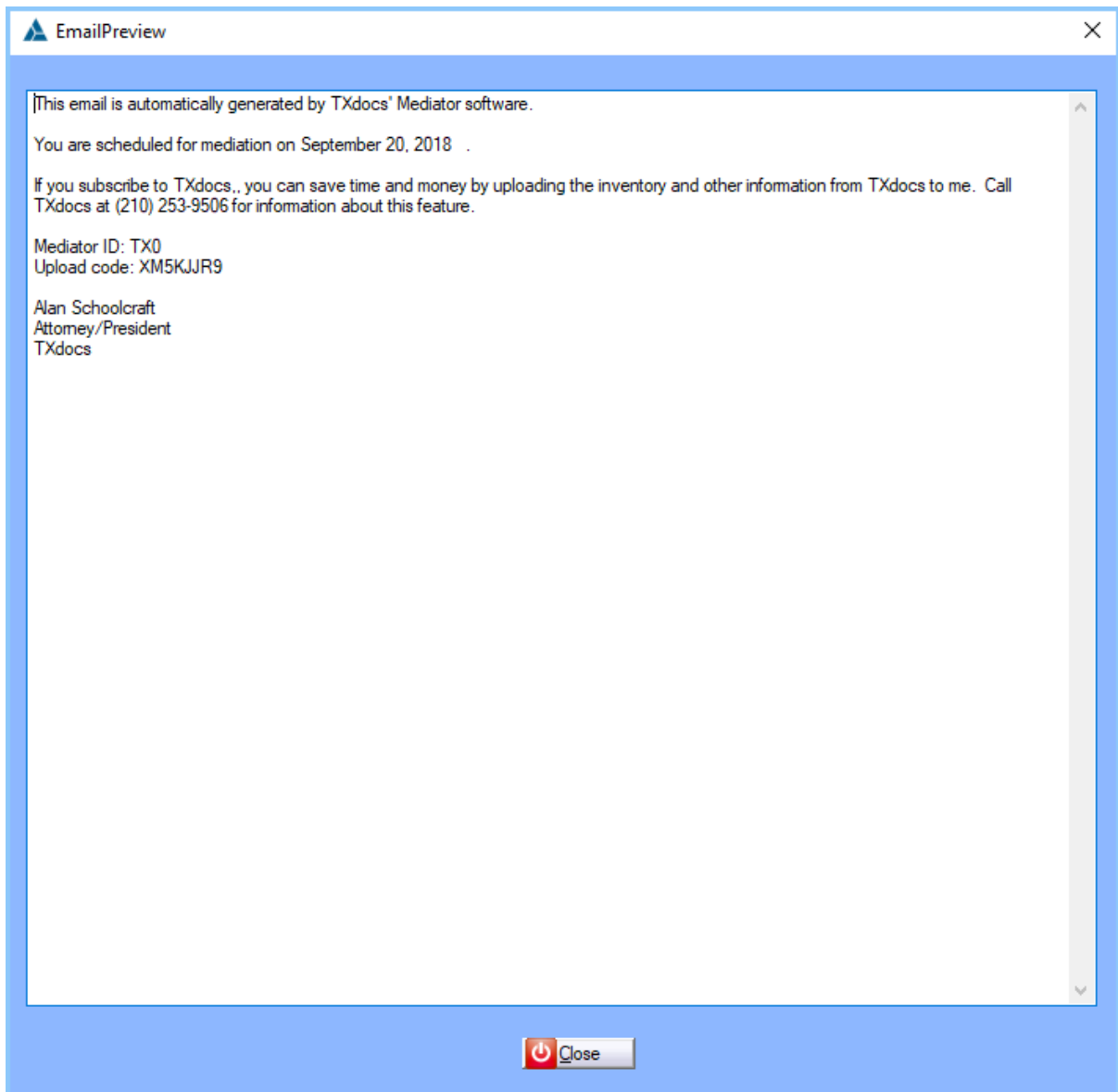
The screenshot shows a dialog box titled "Case Will Be Added" with a close button (X) in the top right corner. The dialog has a light blue background. It contains the following fields and controls:

- Case description:** A text box containing "Smithson v. Smithson".
- Mediation Date:** A date picker control showing a calendar icon.
- ☐ The parties are pro se
- Petitioner's attorney:** A button with a blue checkmark and the word "Select" next to the text "Alan Schoolcraft".
- Respondent's attorney:** A button with a blue checkmark and the word "Select" next to the text "Laura Smith".
- ☒ Send introductory email to attorneys (This checkbox is highlighted with a green background.)
- At the bottom right are three buttons: "OK" (with a green checkmark icon), "Cancel" (with a red X icon), and "Help" (with a yellow question mark icon).

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](#)¹⁰¹. 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.

Check here to send copies to yourself

- ☐
- Email copies to yourself



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.

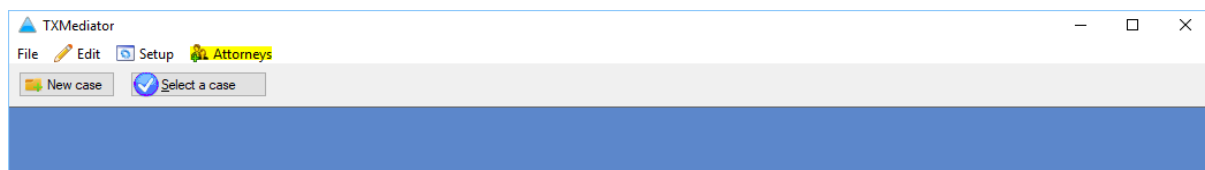
The screenshot shows a dialog box titled "Email Instructions to Petitioner's Attorney". It contains the following fields and controls:

- From:** alan@txdocs.com
- To:** sam.sharkey@gmail.com
- Subject:** RE: Requested TXdocs upload information
- Body:** This email is being sent by TXdocs' Mediator software.
As you requested, the upload information for TXdocs is shown below:
- Mediator ID:** TXM123
- Upload code:** XM5KJJR9
- Text:** YOUR NAME AND CONTACT INFORMATION WILL BE INSERTED HERE. Go to Setup/Email to fill-in how you want your signature block shown.
- Buttons:** Remove, Preview, Send email, Close, Help
- Checkboxes:** Email a copy to yourself (checked)
- File Path:** C:\Users\alan\Documents\Forms Lists\Family Law Forms.pdf

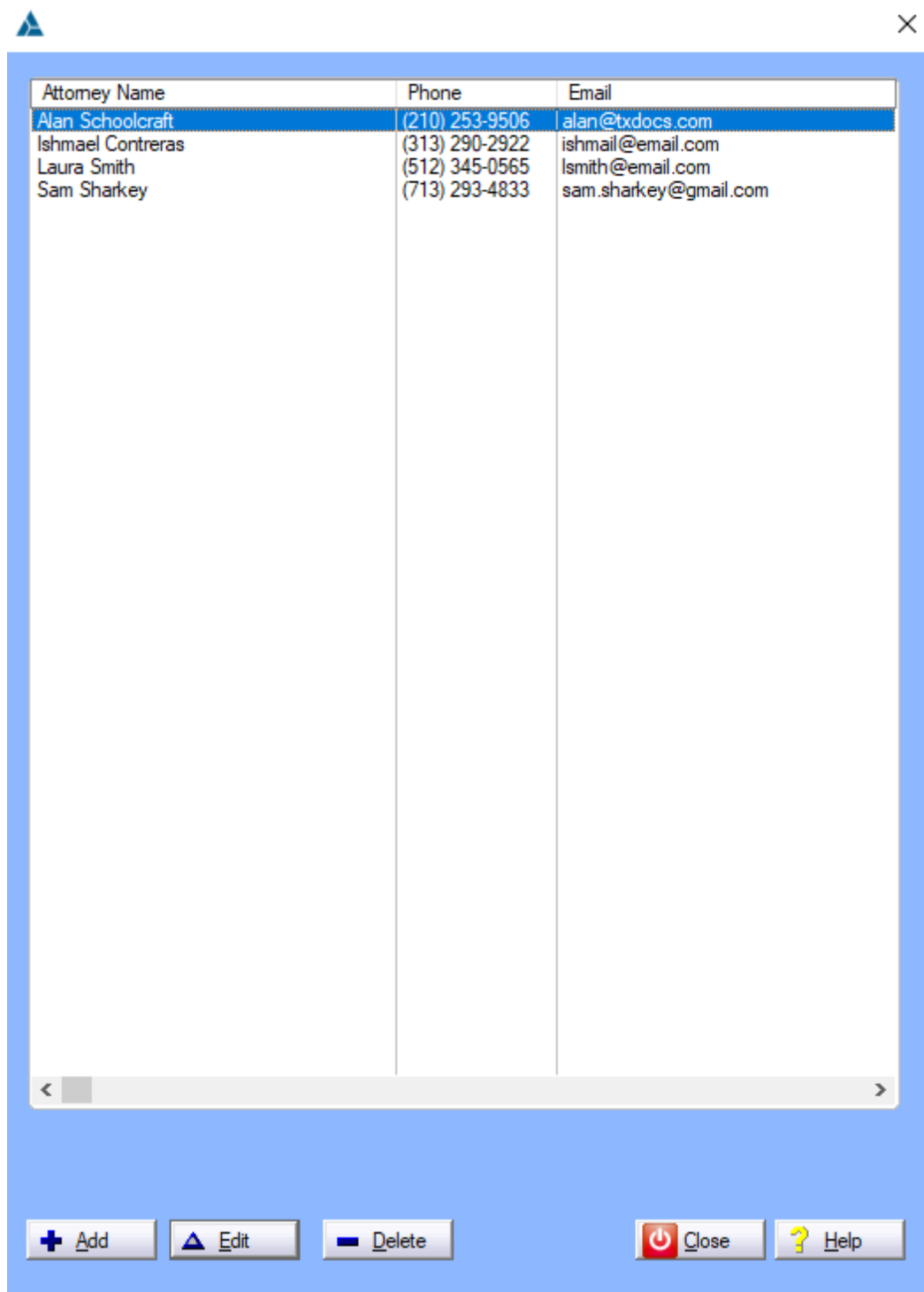
4.4 Attorneys contact information

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.

The screenshot shows the 'Case Manager' window with the following elements:

- Mediation date:** 9/20/18
- Petitioner's attorney:** View (disabled), Select (checked), Sam Sharkey
- Respondent's attorney:** View (disabled), Select (checked), Laura Smith
- ☐ Use short form property listing
- Parties & Issues** (selected tab), Documents, Attorney data upload
- ☐ A divorce proceeding has not yet been filed
- ☐ The parties are pro se
- Parties**
 - Petitioner name: Andy Abemathy
 - Respondent name: Annie Abemathy
- Children**
 - Name: Andrew J. Abemathy, Sharon Abemathy
 - + Add, Edit, Delete buttons
- Issues**
 - ☒ Property, ☒ Conservatorship, ☒ Child support, ☒ Spousal maintenance, ☒ Income taxes
- Unresolved issues**
 - ☒ This is a partial settlement and there are unresolved issues remaining
 - (NOTE: This will show an "Unresolved" issues button on the toolbar for you to list the unresolved issues.)
- Buttons:** OK (green checkmark), Cancel (red X), Help (yellow question mark)

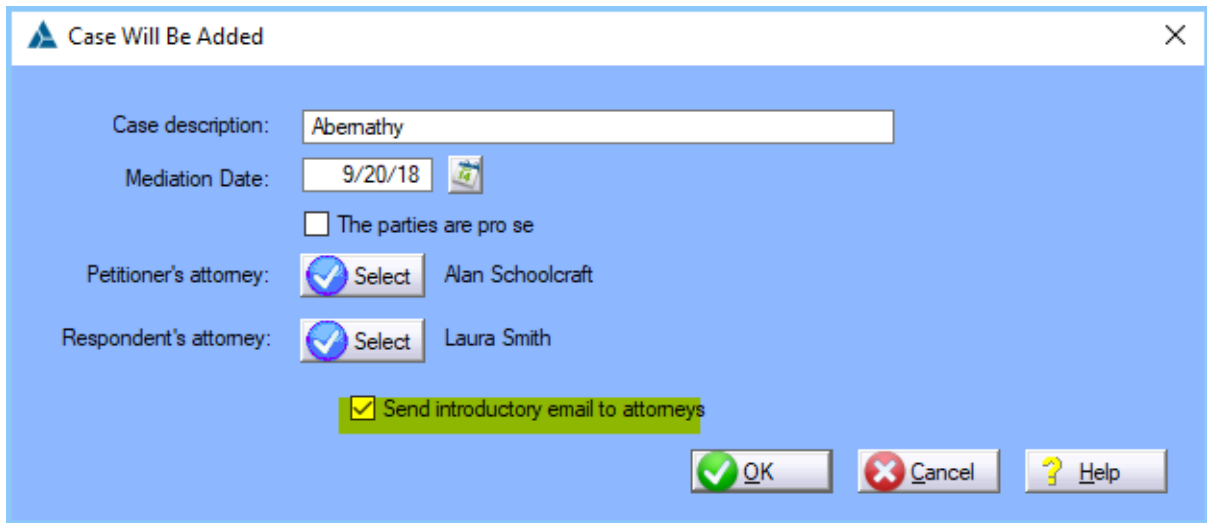
A yellow callout bubble points to the 'View' button for the Respondent's attorney, containing the text: "Click a View button to see the attorney's contact information."

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.



The screenshot shows a dialog box titled "Case Will Be Added" with a close button (X) in the top right corner. The dialog has a light blue background. It contains the following fields and controls:

- Case description:** A text box containing the word "Abemathy".
- Mediation Date:** A date picker showing "9/20/18" with a calendar icon to its right.
- The parties are pro se:** An unchecked checkbox.
- Petitioner's attorney:** A button with a blue checkmark icon and the text "Select", followed by the name "Alan Schoolcraft".
- Respondent's attorney:** A button with a blue checkmark icon and the text "Select", followed by the name "Laura Smith".
- Send introductory email to attorneys:** A checked checkbox.
- Buttons:** Three buttons at the bottom right: "OK" with a green checkmark icon, "Cancel" with a red X icon, and "Help" with a yellow question mark icon.

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.

Case Manager [X]

Mediation date: 9/20/18 [Calendar Icon]

Petitioner's attorney: [View] [Select] Sam Sharkey

Respondent's attorney: [View] [Select] Laura Smith

☐ Use short form property listing

Parties & Issues | Documents | **Attorney data upload**

[Send Introductory Email Icon] Send introductory email to attorneys

[Email Upload Icon] Email upload instructions to Petitioner's attorney

[Email Upload Icon] Email upload instructions to Respondent's attorney

Manage uploaded data

If a party uploaded incomplete or empty data you can delete that data to allow a new upload or you simply ignore the uploaded data and use the short form inventory instead.

[Delete uploaded data to allow a new upload]

[OK] [Cancel] [Help]

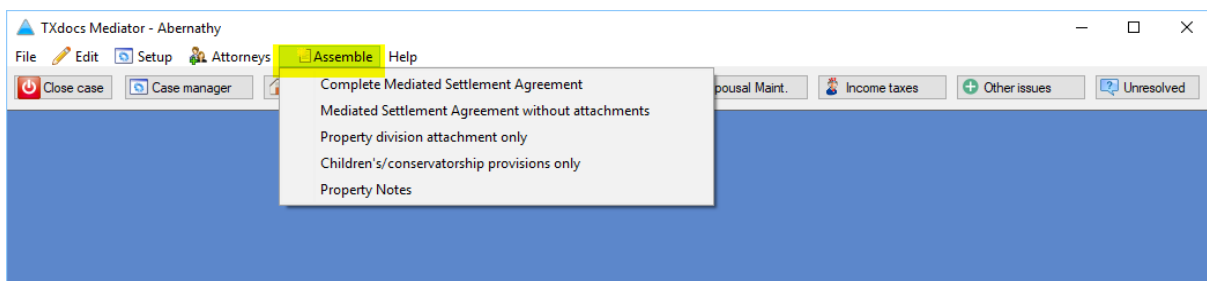
Chapter 4 Assembling Documents

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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