

CAR.ODR.com Handbook for Mediators

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Contact us with any questions at:

Elizabeth Lesser 213-739-8261

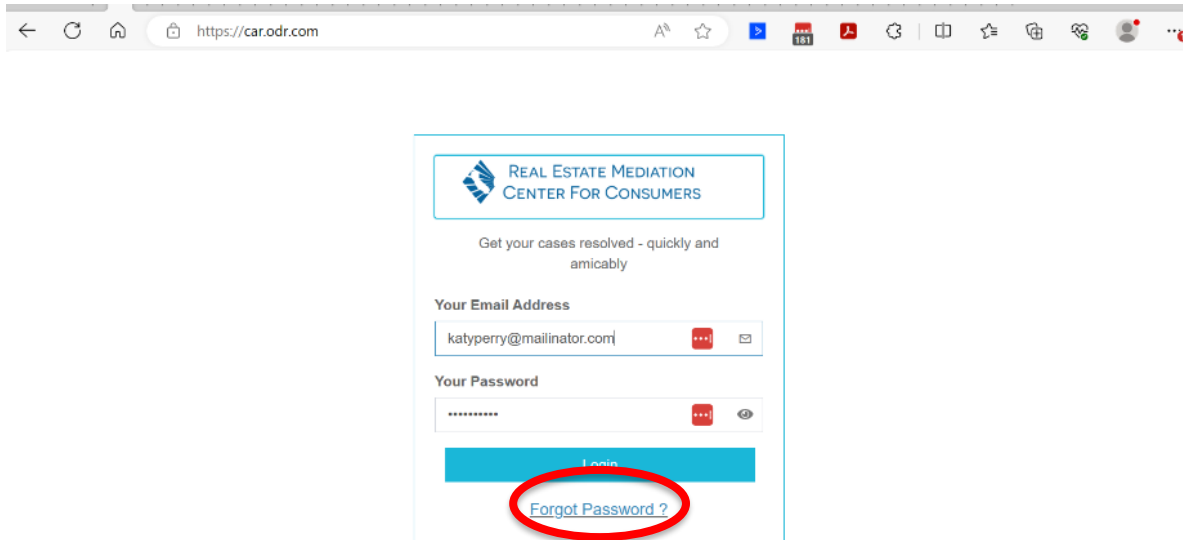
Maria Wilson 213-739-8260

mediation@car.org

Logging into the Platform

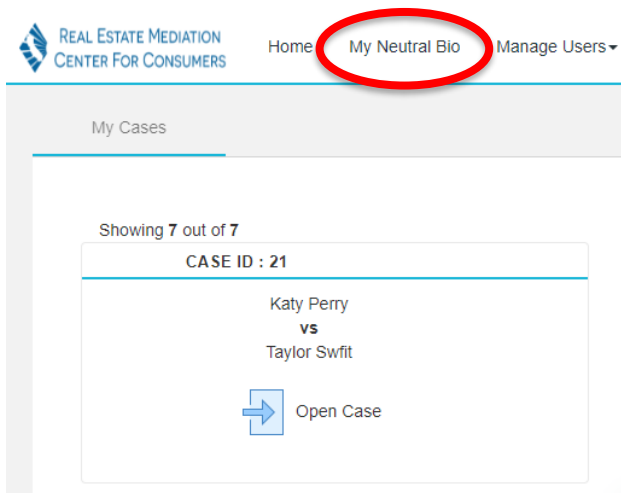
When your mediator account is added to the system, you will receive an auto-email from no-reply@car.odr.com to create a password.

If you do not receive this email, (or do not remember your password), visit <http://car.odr.com> to access the platform. You may click Forgot Password. This will trigger an email link to be sent to you to reset your password.



Editing Your Profile

Enter your email and password to log in. Once you log in, you'll see the below overview page. To edit your profile, click on "My Neutral Bio" in the top menu.



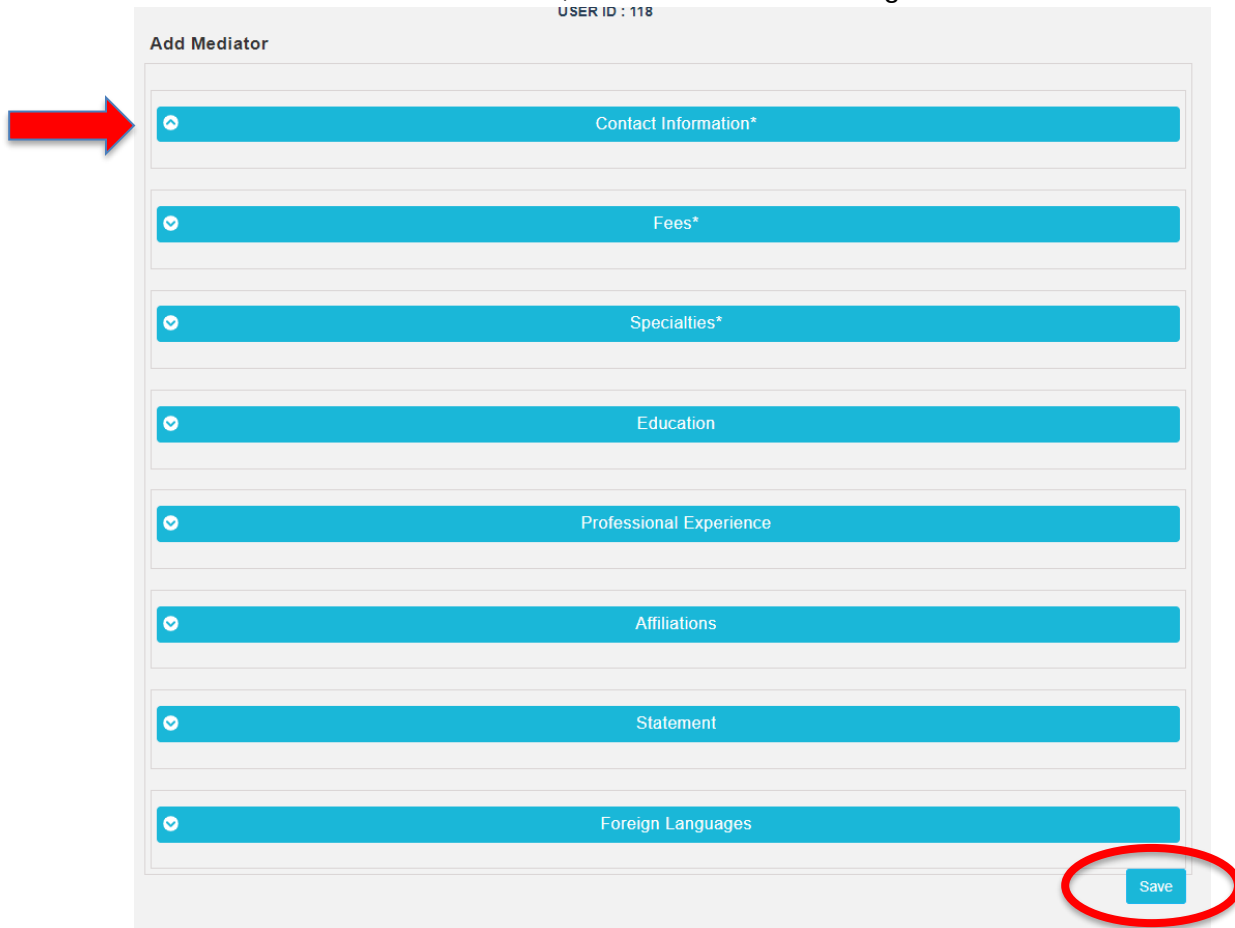
You will see your profile where you can edit the following sections:

<https://www.car.org/disputeresolution>

1. Contact information – You can provide contact information for yourself and your assistant (if applicable). You can also provide further details about if and where you offer in-person services.
2. Fees – Include any additional fee information (such as travel fees or deposit information) under additional fee information.
3. Specialties – Select any checkboxes to indicate your specialties and add additional specialties in the notes.
4. Education – You may include your education and any relevant certificates in this section.
5. Professional experience – If you have any professional experience that you would like to reference, you may do so here.
6. Affiliations – You may list any affiliations, such as bar associations, ADR organizations, etc.
7. Statement – Include a statement here for parties to understand your mediation philosophy.
8. Foreign languages – Select any foreign languages that you speak here.

The screenshot shows a web application interface for the REAL ESTATE MEDIATION CENTER FOR CONSUMERS. The top navigation bar includes the logo and links for Home, My Profile, and Manage Users. The main content area is titled 'Add Mediator' and features a 'Contact Information*' section. This section includes a 'My Profile' area with a placeholder for a profile picture and a link to 'Add profile picture'. Below this, there are three required text input fields: 'First Name *' (containing 'Stephen'), 'Last Name *' (containing 'Curry'), and 'Email *' (containing 'stephencurry@mailinator.com'). Each field has a character limit of 128 characters.

To select a section to view & edit, click on the blue heading.



The screenshot shows a web form titled "Add Mediator" with a "USER ID : 118" label. The form contains eight blue heading buttons, each with a dropdown arrow icon on the left: "Contact Information*", "Fees*", "Specialties*", "Education", "Professional Experience", "Affiliations", "Statement", and "Foreign Languages". A red arrow points to the "Contact Information*" button. At the bottom right of the form, a blue "Save" button is circled in red.

When you are done editing, click save. You must complete the required (*) fields prior to saving.

When you are proposed as a mediator

If you are proposed as a mediator, you will receive an email notification. **This is just a notification, and no action is required until a case is assigned. You do not need to confirm to us that you have received the notification.** This will help you track how often you are proposed for mediations under the program.

You have been proposed for a new mediation



C.A.R. Mediation Center <no-reply@car.odr.com>

To mohan+n3@crekodr.com

Cc Mediation

Retention Policy Car Retention Policy (2 years)

If there are problems with how this message is displayed, click here to view it in a web browser.

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you

Hello Mohan N1,

You have been proposed as a mediator for Case 17. We will let you know if the parties select you as the mediator.

Regards,

C.A.R. Real Estate Mediation Center

mediation@car.org

213-739-8376

When you are selected as a mediator

When you are assigned to a case, you will receive an email notification.

You have been selected as the mediator RE: 525 S. Virgil Avenue Los Angeles CA 90020



C.A.R. Mediation Center <no-reply@car.odr.com>
to me

Feb 14, 2024, 3:07 PM (1 day ago)

Hello Lizzy Lesser,

You have been accepted as the mediator for 525 S. Virgil Avenue Los Angeles CA 90020. Please login to your account to review the case.

To get started, you are kindly requested to follow the steps listed below:

- 1) If this is your first time on the Caseload Manager, [Click Here](#) to set password and access your case.
- 2) If you have already set a password, then [Login Here](#) with your password.

Regards,

C.A.R. Real Estate Mediation Center

mediation@car.org

213-739-8376

You will be prompted to go into Caseload Manager to perform a conflict check. You may do this by reviewing [Intake Details](#), [Documents](#), & [Users](#).

If you can accept the matter, you should add a message to [Case Home](#). This will inform the parties & program staff that you have accepted the matter.

Case Home

Case Detail

Intake Details

Documents

Users

Discussions

CASE ID : 21

Add New Message

Welcome to C.A.R. Mediation!

Thank you for selecting me as your mediator. I have completed my conflict check and can accept this matter. Please refer to discussions for further information.

Created by : Stephen Curry

Feb 9, 2024, 12:14:27 PM

If you have any disclosures for the parties to review or any other matters to communicate to the parties, please email them directly. If you must decline the matter, please inform program staff at mediation@car.org.

If the parties select another mediator, you will also receive a notification informing you.

Parties Selected Another Mediator



C.A.R. Mediation Center <no-reply@car.odr.com>

To mohan+n3@crekodr.com

Cc Mediation

Retention Policy Car Retention Policy (2 years)

If there are problems with how this message is displayed, click here to view it in a web browser.

CAUTION: This email originated from outside of the organization. Do not click li

Hello Mohan,

The parties have selected another mediator for Case 17.

Regards,

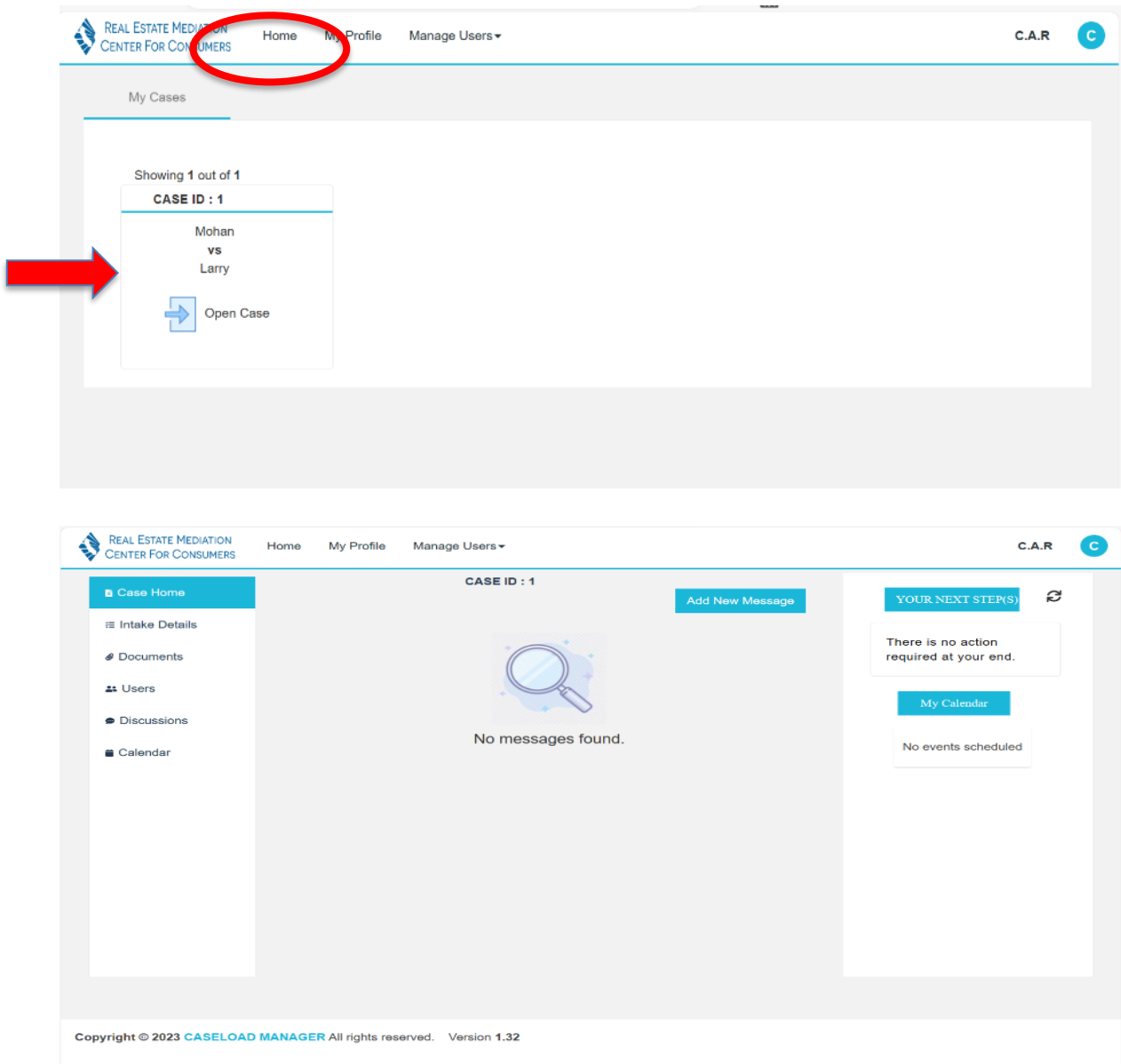
C.A.R. Real Estate Mediation Center

mediation@car.org

213-739-8376

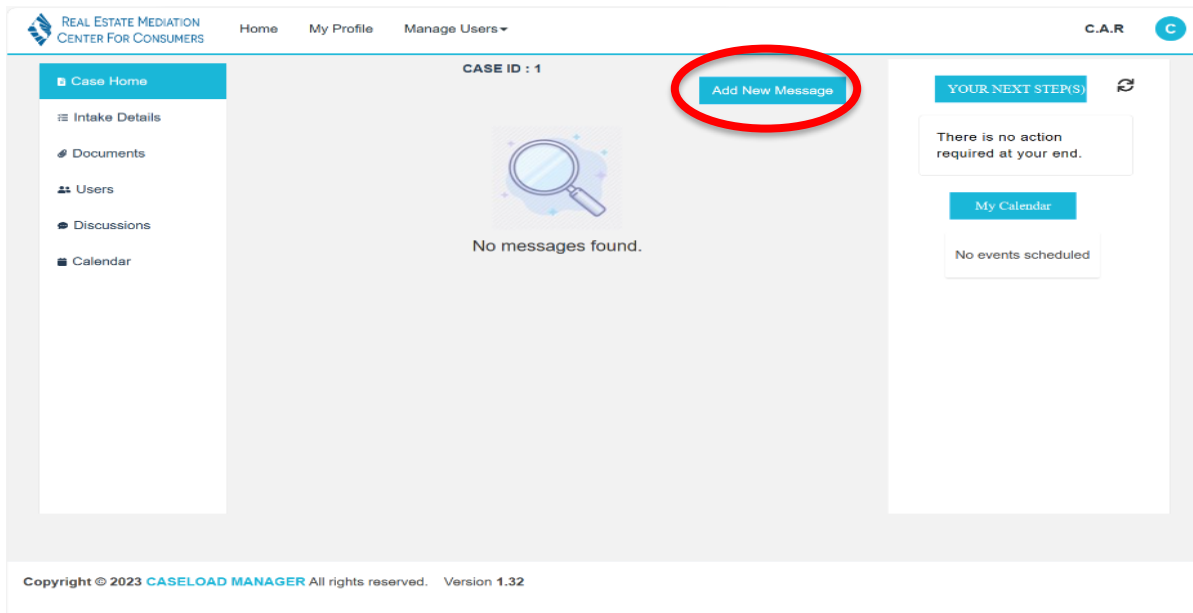
Viewing a Case

To view the cases assigned to you, click on home. Once you click on a case, you'll land on that case's home screen.



Case Home

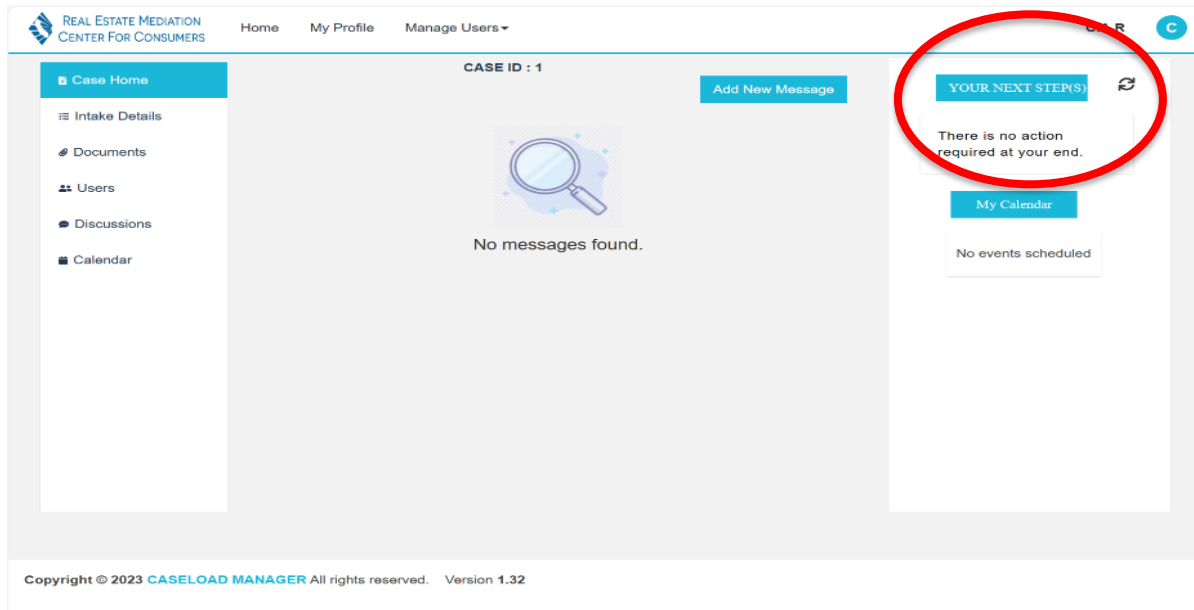
On the case home screen, anyone associated with the case (including mediation participants and program staff) will be able to post a message that is **visible to all case participants**.



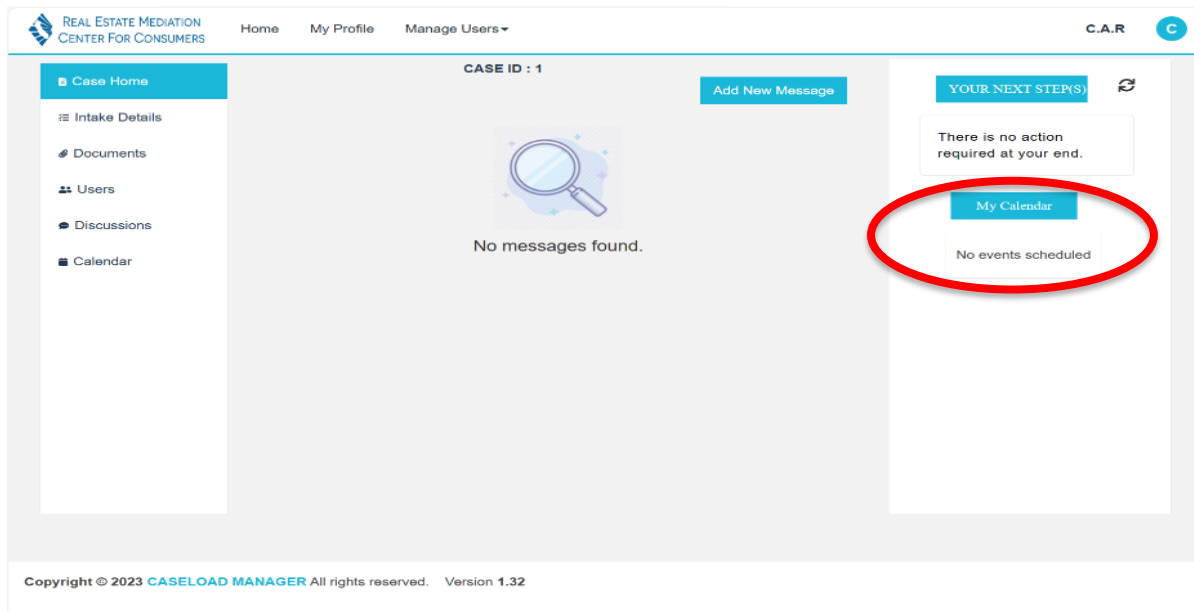
If you click “Add New Message,” the following screen will open for messages. You may use this feature to communicate important notices such as key contact information, important deadlines, etc. These messages may be deleted by the individual that posted them after they have been saved. **Parties will not currently receive email notifications when a message has been posted. We recommend following up them via phone/email to confirm receipt. We are also reminding parties to check the status of the mediation in the system.**

The case home will list any next steps that are due. **You should not see any items listed here.** This will only apply to program staff and parties prior to the matter being assigned to you.

If you ever notice that Your Next Steps disappears, please click the arrow circles to refresh the menu options.



If you enter a [calendar item](#), they will be listed on the case home for quick reference.



Intake Details

If you click on “Intake Details”, you’ll see all the information that was submitted by the filer when they created the case. **This will be visible to everyone associated with the case.**

REAL ESTATE MEDIATION
CENTER FOR CONSUMERS

Home My Profile Manage Users

C.A.R. C

CASE ID : 1

INTAKE SOURCE : 1

Page : 1 / 4

Request to Mediate

A copy of the Request to Mediate Form will be visible to Parties and their Attorneys and Representatives.

Subject Property Address*

1st street

CA CA 33746

PLEASE PROVIDE THE ADDRESS OF THE PROPERTY THAT IS THE SUBJECT OF THE DISPUTE. THE STREET ADDRESS WILL BE USED TO TRACK YOUR MATTER AND SHOULD BE INCLUDED IN ALL CORRESPONDENCE. THANK YOU .

Note that matters within the jurisdiction of a small claims court are excluded from the requirement to mediate in standard C.A.R form agreements. Other exclusions may also apply. Please refer to the agreement to determine any exclusions to the requirement to mediate.

Basis for the dispute

Please select the basis for the dispute (Select all that apply). You will be given the opportunity to provide further details and a mediation brief directly to your mediator once the mediation is confirmed.*

☐ Deposit dispute

☒ Failure to disclose a known defect

☐ Landlord-tenant dispute

☐ Homeowners association dispute

☐ Other

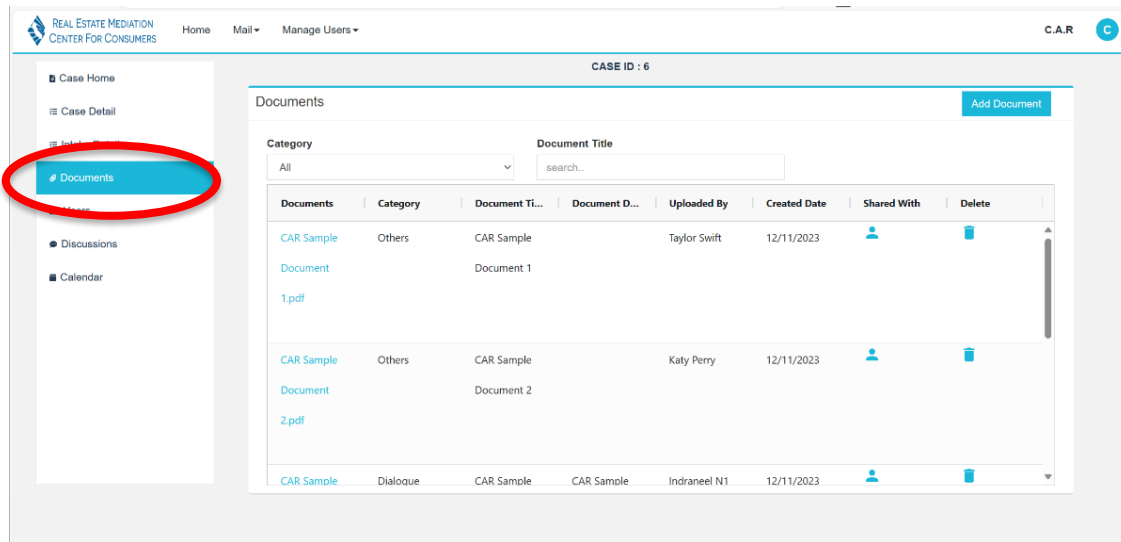
Estimation of Dispute Value - [This will be shared with Responding Party(ies)]

\$10,001 to \$25,000

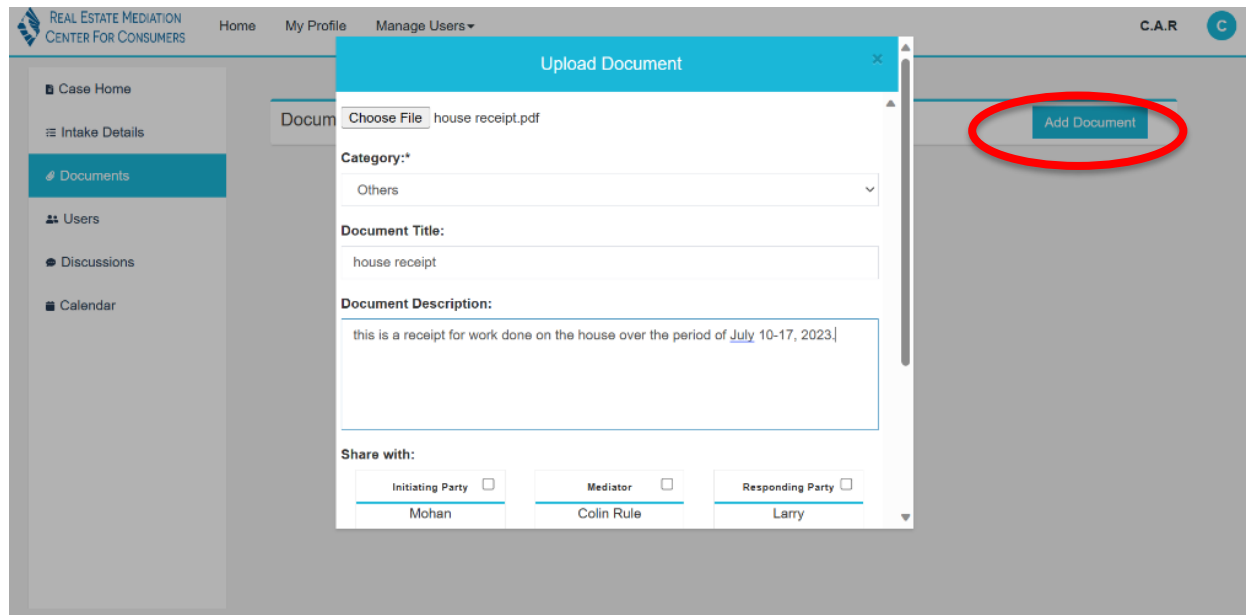
Next

Documents

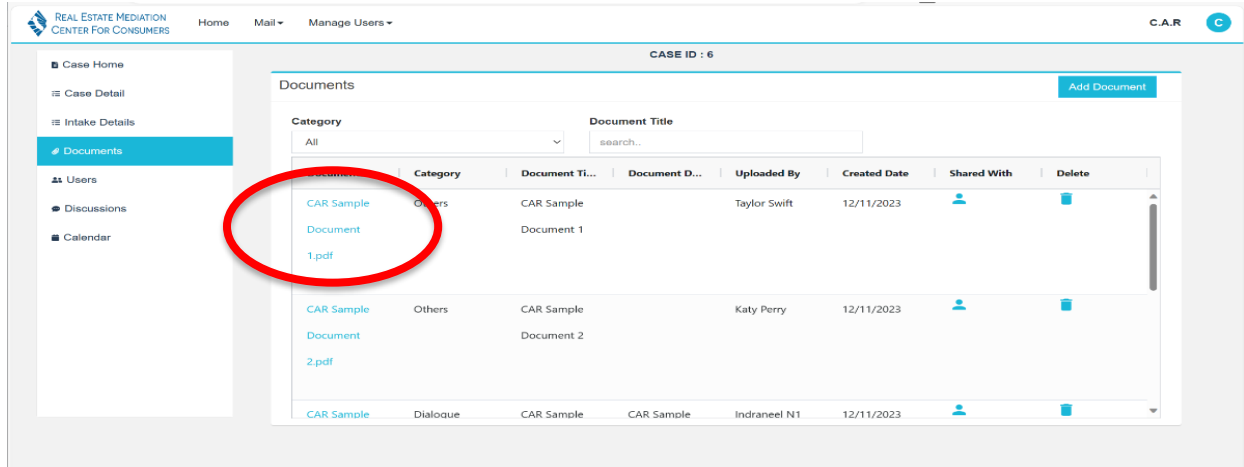
If you click on “Documents,” you will see the documents that have been uploaded into the case and shared with you. Individuals uploading documents may specify which individuals will have access to uploaded documents. When we assign a case to you, we will upload any documents we have received here. **Parties will not currently receive email notifications when a document has been posted.**



If you'd like to upload a document, click "Add Document" and you'll be presented with a menu to upload the document, a drop down to categorize it, a description box, and options to decide who in the case will be able to see it. Anyone associated with the case will be able to access documents that are shared with them and share documents through this section.



To open a document posted by someone else, you may double click on the document name.

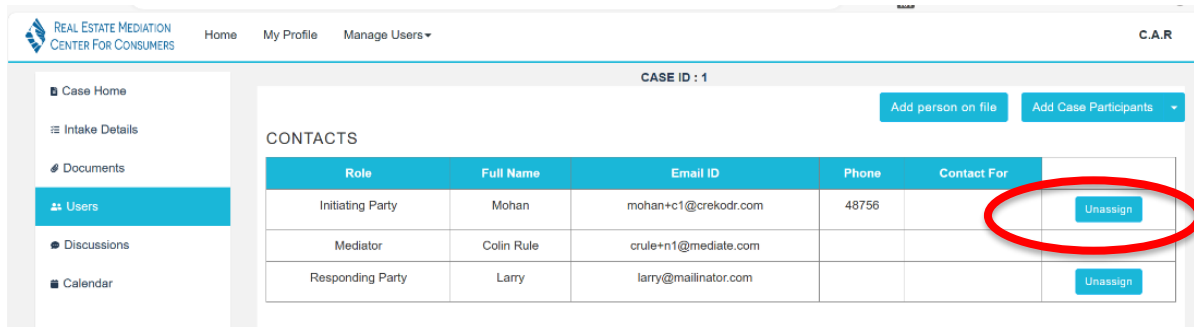


Add & Unassign Users (within a case)

Refer to users within Case Home to add or unassign users from a case (do not attempt to do so within Manage Users in the top navigation). If you click “Users,” you can see all the users who have been added into the case. **This will be visible to everyone associated with the case.**



To remove someone from the case, click “Unassign.”



Follow these instructions to add an existing user to the case (someone who is already registered in the <http://car.odr.com> system). To determine if someone is already a user, click the “Add Person on File” button and search by name or email. If they are an existing user, you can add them to the case here by selecting the user’s name and their role in this case (Initiating Party, Responding Party, Interested Person, etc) from the dropdowns. Hit submit to add them to the case. If they are not in the case, refer below to add a new user. **Only mediators and program staff will be able to assign or unassign participants to a case.**

The screenshot shows the 'REAL ESTATE MEDIATION CENTER FOR CONSUMERS' interface. On the left is a sidebar with navigation links: Case Home, Intake Details, Documents, Users (selected), Discussions, and Calendar. The main area is titled 'CASE ID : 1'. At the top right of the main area is a button 'Add person on file' circled in red, and a dropdown menu 'Case Participants'. Below this is a table titled 'CONTACTS' with columns: Role, Full Name, Email ID, Phone, Contact For, and an 'Unassign' button. The table contains three rows: Initiating Party (Mohan, mohan+c1@crekodr.com, 48756), Mediator (Colin Rule, crule+n1@mediate.com), and Responding Party (Larry, larry@mailinator.com).

The screenshot shows the 'Add Existing Person' form. It has a 'Persons' dropdown menu and a 'Person Type:' dropdown menu. A 'Submit' button is located at the top right of the form.

To add a new user (someone who is not registered in the <http://car.odr.com> system), click “Add Case Participants.” You will then select the type of user from the dropdown.

The screenshot shows the 'CONTACTS' table with the 'Add Case Participants' dropdown menu open. The table has columns: Role, Full Name, Email ID, Phone, and Contact For. The table contains five rows: Admin (Elizabeth Lesser, elizabethl@car.org, 213-739-8261), Admin (Mohan N, mohan@crekodr.com), Initiating Party (Mohan, mohan+c1@crekodr.com, 3457634), Mediator (Mohan N1, mohan+n3@crekodr.com), and Responding Party (Larry, larry@mailinator.com). The dropdown menu shows options: Add Initiating Party, Add Responding Party, Add Mediator, Add Initiating Party Representative, Add Responding Party Representative, Add Interested person, Add Admin, Add Attorney, Add Other, and Add Interested Person Representative. An 'Unassign' button is also visible.

Once you enter their contact information and hit submit, the new participant will be added to the case. They will appear in the user table and be sent an email to set a password and log in.

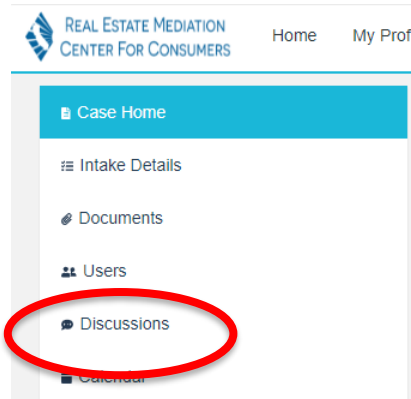
If you have multiple Initiating or Responding Parties with different attorneys, when you click “Add Initiating/Responding Party Representative,” you will be able to select which party the attorney represents.

Discussions

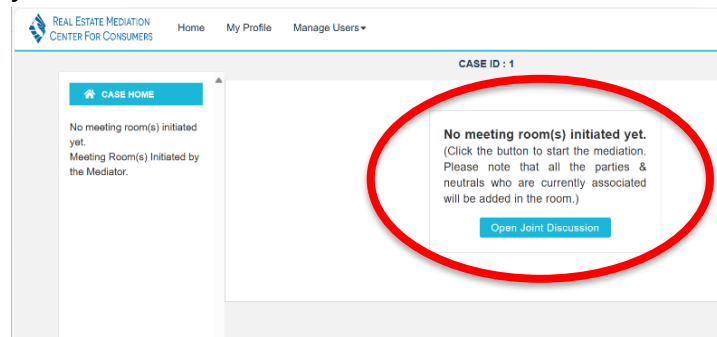
Program staff will not be able to view the discussions. They will only be able to see that you have opened the discussion.

You control when the discussion forum is opened to the parties. You can use the discussion for confidential discussions with all participants. This is intended for pre or post mediation discussions with the parties (such as to coordinate a mediation date or to further discuss settlement details after a mediation).

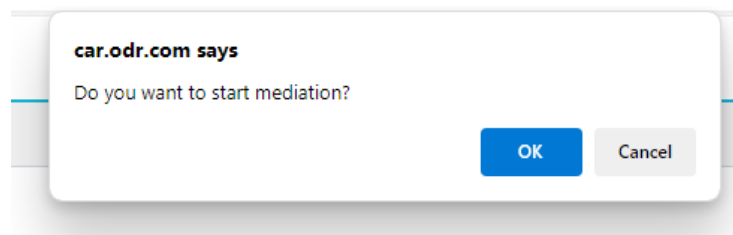
If you click “Discussions” in the left-hand menu, you will see a page notifying you that no discussion has been set up yet.



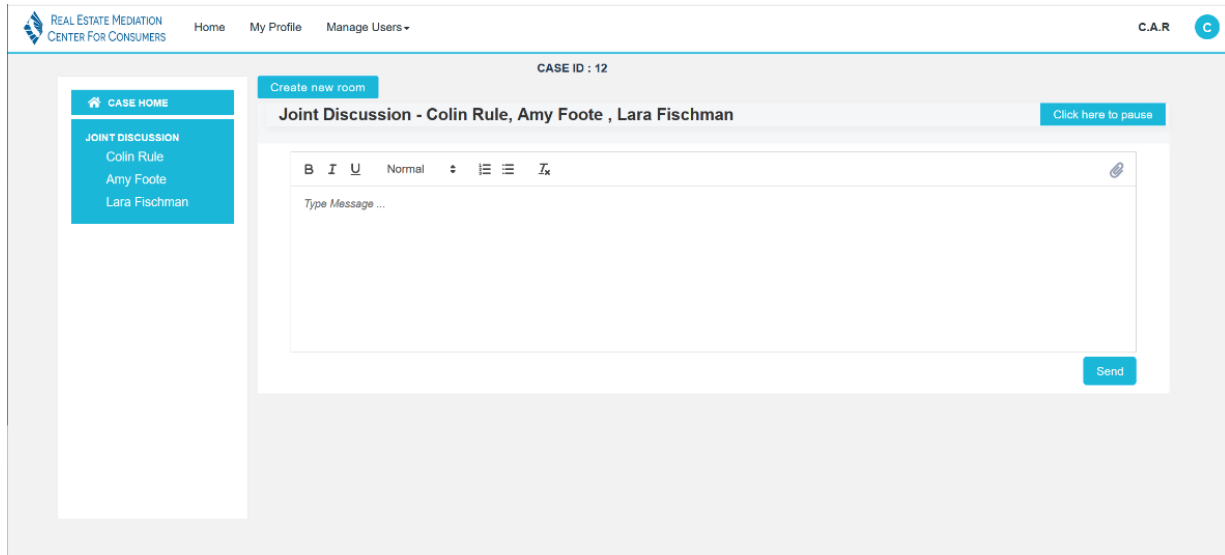
If you click “Open Joint Discussion” you’ll be presented with a pop-up confirmation box asking if you want to start the mediation.



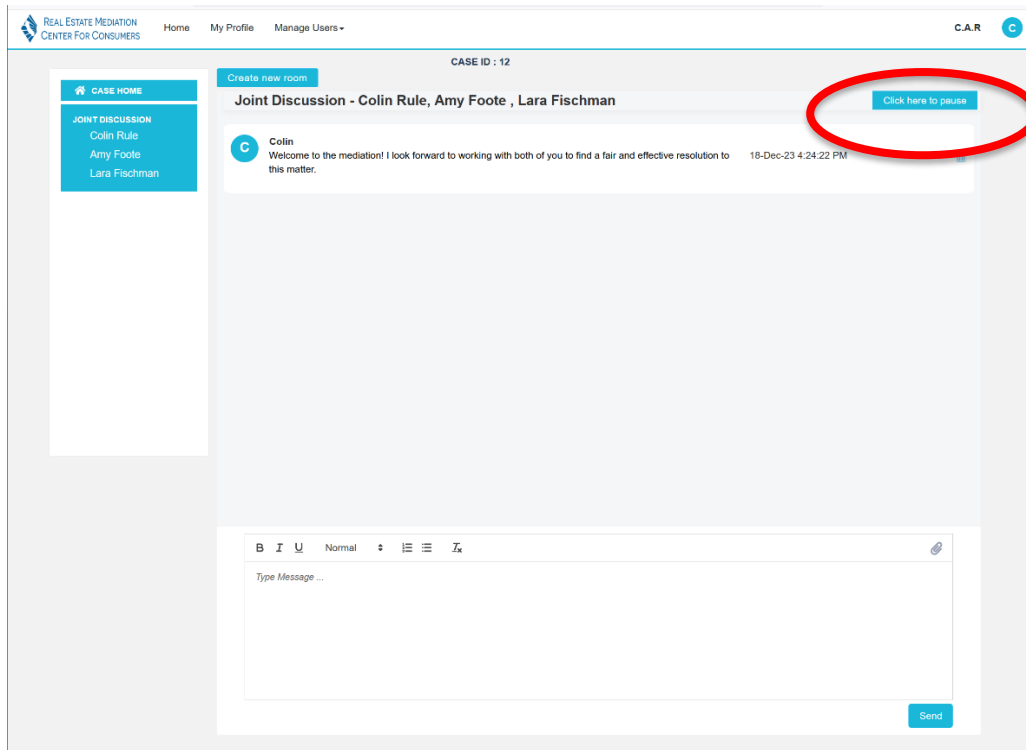
When you click ok, the joint discussion will be opened to all participants.



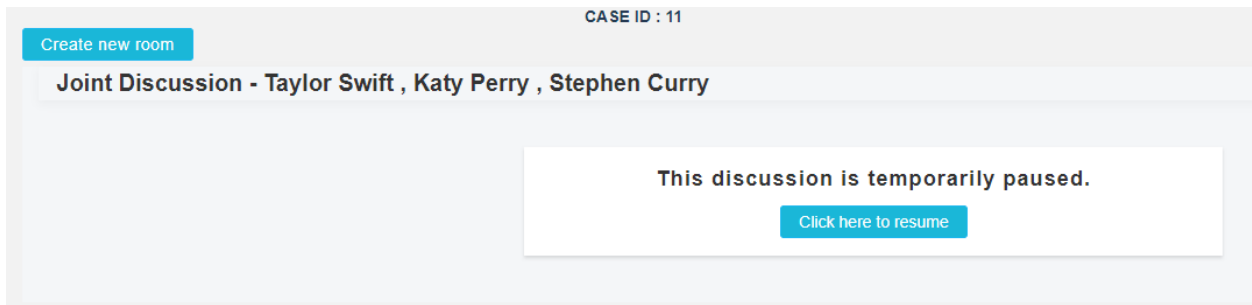
In the joint discussion, you can type in a message in the text box at the bottom of the page and hit “send.” The message will appear to all participants. **Parties will not currently receive email notifications when a message has been posted in discussions.**



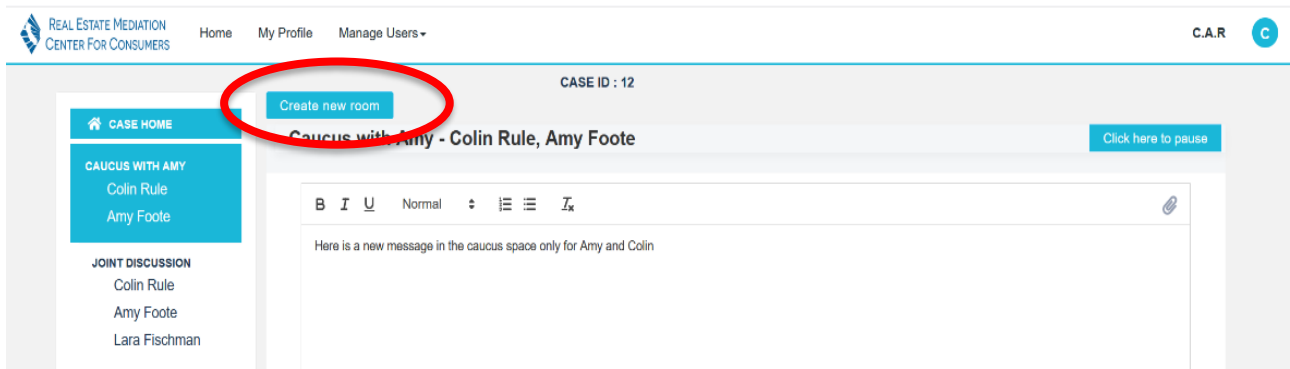
You may “Click here to pause” the joint discussion if needed and direct parties to their separate caucus rooms.



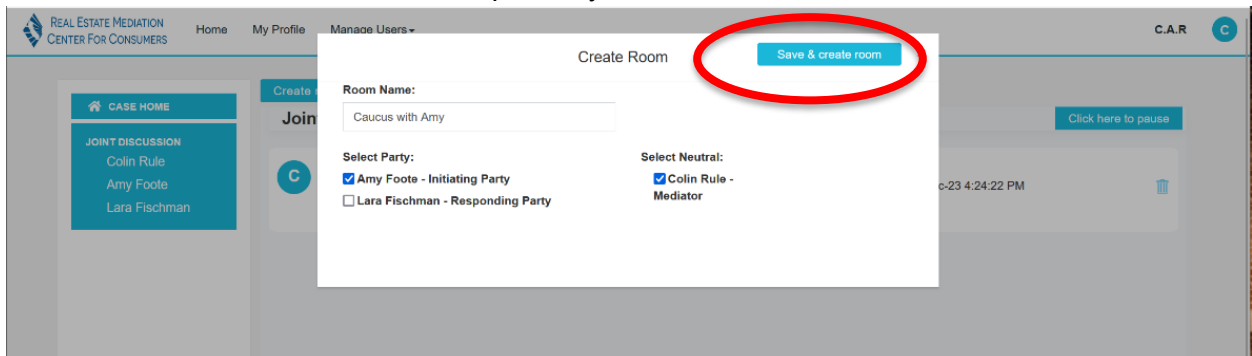
When you are ready to resume a joint discussion, you may reopen it. Only the mediator will have the ability to pause and resume the discussion.



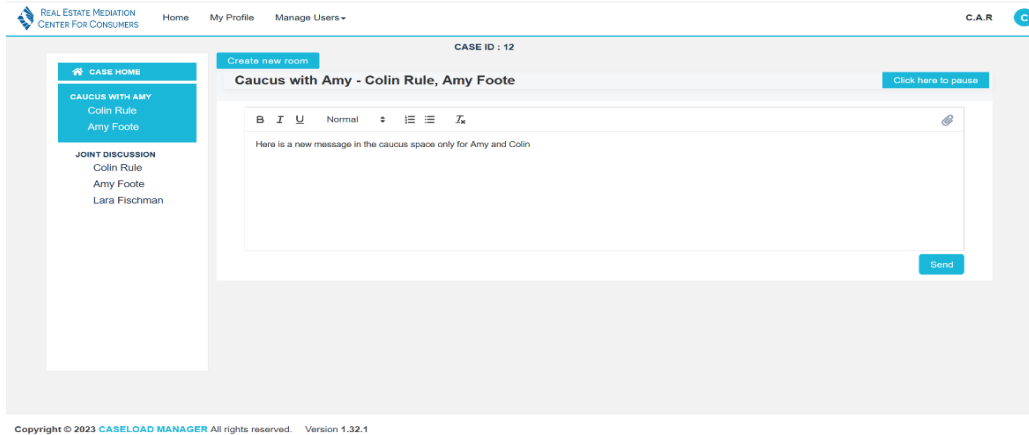
If you want to open a new room (e.g. a caucus room), click “Create new room” at the top of the page.



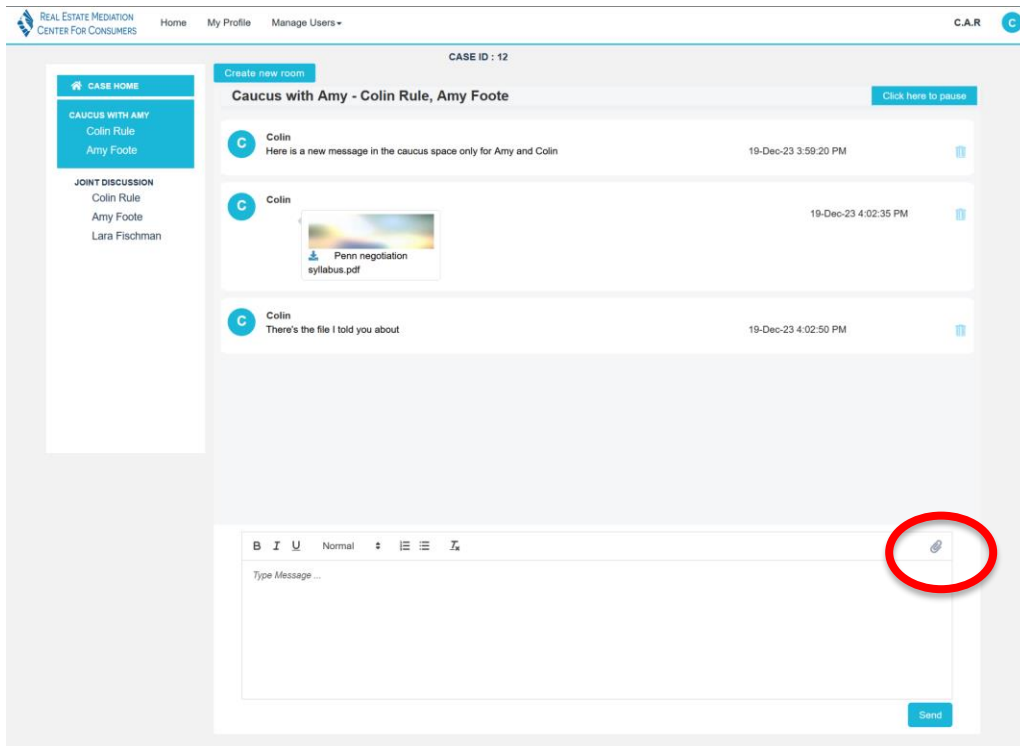
You can then name the room and specify who will be in the new room by selecting the checkboxes next to the names of the parties you’d like to include.



Once you click “Save & Create Room” your room will be created and will appear in the left-hand menu. When you click on it, you can post a message just in that room – only the parties who are in the room will be able to see it.



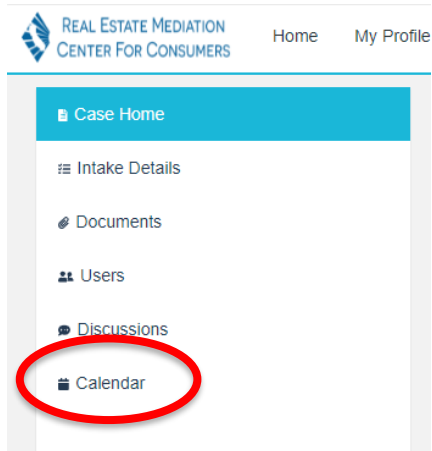
You can also attach a file to a message posted in the discussion forums – just click the paper clip icon in the upper right of the “post a new message” text box and you can select a file to attach to your message.



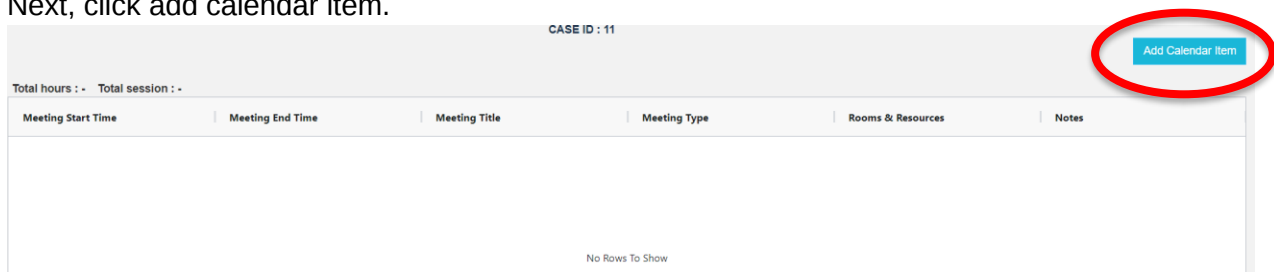
Once you send, it will appear in your discussion thread (and it will be added to the documents area in the case as well).

Calendar

To create a new calendar item (e.g., any meeting around the mediation), click on calendar.



Next, click add calendar item.



Fill out page 1 with the event details and click next.

The screenshot displays the 'Add Calendar Item' form, which is divided into two tabs: 'Event Details Page' (active) and 'Invitee Details'. The form includes the following fields:

- Start date/time ***: 1/10/2024, 12:30 PM
- End date/time ***: 1/10/2024, 3:30 PM
- Event Title ***: Mediation Session (with a note: 'The maximum characters allowed for this field is 256.')
- Type**: Online (dropdown menu)
- Notes**: Zoom link: (text area)

At the bottom of the form, there are two buttons: 'Next' (circled in red) and 'Submit'.

Select the program staff and parties to receive an email notification about the calendar item being added.

Event Details Page 2 Invitee Details

Staff: Required *

- Admin - Colin Rule (crule@mediate.com)
- Admin - Indraneel Gunjal (indraneel+s1@mediate.com)
- Admin - Mohan N (mohan@crekodr.com)
- Admin - Elizabeth Lesser (elizabethl@car.org)

☐ Select Parties by role

☒ Select Parties

Select parties from this case

- Initiating Party - Katy Perry
- Responding Party - Taylor Swift

Associate Panelist in case

- Panelist - Stephen Curry (stephencurry@mailinator.com)

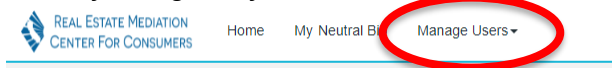
When you click submit, everyone selected will be notified about the calendar item being added both by email & a calendar item listed within the platform.

Total hours : - Total session : -

Meeting Start Time	Meeting End Time	Meeting Title	Meeting Type	Rooms & Resources	Notes
2024-01-10 12:30:22	2024-01-10 15:30:36	Mediation Session	Online		Zoom link

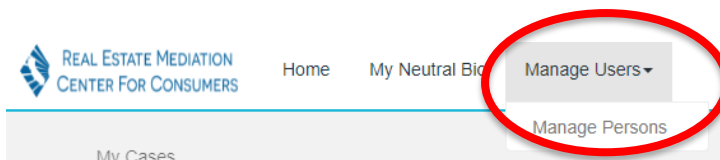
Edit Existing Users

When you login to your account, you will see that you have a tab called Manage Users.

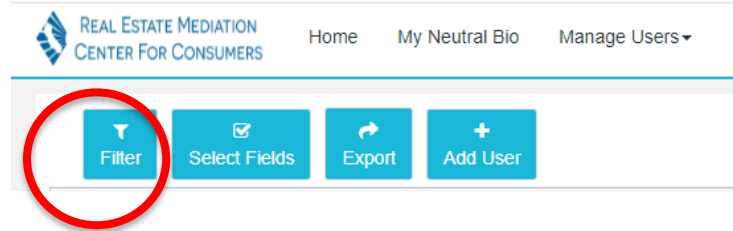


This will list all users (parties, counsel & Interested Persons) who have an account in the system. It does not identify any information about the case(s) that they are associated with.

If you need to revise contact information for parties, click Manage Users and then Manage Persons. Refer to [Add and Unassign Users](#) to determine if a user already has an account in the system.



To search for a user you need to edit, click filter to search.



We recommend searching by email address. Select "=" and then insert email address and hit apply.

The screenshot shows the 'Display Filters' form. The 'Email' field is selected with the operator '=', and the value 'testrespondingparty@mailinator.com' is entered. The 'Apply' button is at the bottom right.

Field	Operator	Value
User sub type		
FirstName		
LastName		
Email	=	testrespondingparty@mailinator.com
User Preferences		
ConfidentialNotes		
Display Name		
Full Name		

This will display only the user with the specified email address.

The screenshot shows the 'Filter' button and the resulting filtered user list. The filter is applied to the 'Email' field with the value 'testrespondingparty@mailinator.com'.

Filter: Email = testrespondingparty@mailinator.com

User sub type	Display Name
Responding Party	Test Responding Party (test)

If you need to edit the contact information, you may edit the fields and click submit. NOTE: If a user requests that you change their email address on file, you will need to create a new user. You may refer to [Add & Unassign Users](#) to do this.

Send us an email requesting the unused email address account be deleted from the system.