

Pact Mediation Matter Management

Flexibility with Structure



So what does it do?

- Gives an immediate overview of cases, from referral through to archiving
- Keeps a complete record of all communication on a client's case
- Complies with LSC requirements & generates monthly reports
- Reduces time spent on admin, and increases profitability
- Customisable by users, including logos
- Produces invoices and assists with accounts
- Assists to market your business

Details

File Case Summary Client Details Records Children Standard Documents Invoices Contact Reports Help

Alison Carr And Peter Carr Critical Notes Living together but both keen to move on struggling financially Case Number 15

Case Summary Client Details Records Children

Referral

Referral Date 23/08/2012
 Ref Source 01 Funding code referra
 Mediator Fiona Thompson
 Med Location AIM office
 Safety
 Co-Mediated
 Co-Mediator Fiona Thompson
 Why Co-Mediated
 vulnerability

Willingness

Willingness
 Willingness Date 31/08/2012

Intake/Assessment

How seen AssM - Tog
 Suitable for Mediation
 Why unsuitable

Client A (Alison Carr)

Willing
 Public Funding
 Funding Assessed
 Date Assessed 03/09/2012
 Intake by Fiona Thompson

Client B (Peter Carr)

Willing
 Public Funding
 Funding Assessed
 Date Assessed 03/09/2012
 Intake by Fiona Thompson

Mediation

Mediation sessions

Date	Desc	Time	Final
05/09/2012	Med AIM Co	90	
10/09/2012	Med AIM Co	60	
12/09/2012	Med AIM Co	60	<input checked="" type="checkbox"/>

Agreed proposal full note agreement

Disbursements

Date	Desc	Amount

Outcome

Final outcome S - Agreement and Doc
 Why broken down
 File closed date 17/09/2012
 Date to delete 17/09/2012

Decamero softw

and Close

Pact puts you into control of your cases

- All the information you need, you can see at a glance.
- The “Case Summary” shows the case lifecycle from Referral through to Archive.
- All the information captured here goes to fulfilling the LSC contract requirements, with minimum effort on the mediators part.
 - Pact makes your professional life easier.

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Case Summary Client Details Records Children

Client A

First Name **Alison** Phone 0114578554
 Last Name **Carr** Mobile 07748857484
 Salutation Alison Email carr@ali.hhotmail.co.uk
 Address 12 Gloucester Crescent Company
 Rep Charlie Bartlett
 Rep Co Bartlett and Co
 City Leicester
 Postcode LE5 8FT Child
 DOB Disability
 Gender F Ethnic origin 01\White B Age Range D 35-49

quite anxious but keen to achieve a settlement.

Client B

First Name **Peter** Phone 0114578554
 Last Name **Carr** Mobile 0745 9987455
 Salutation Peter Email pcarr@yahoo.co.uk
 Address 12 Gloucester Crescent Company
 Rep
 Rep Co
 City Leicester
 Postcode LE5 8FT Child
 DOB Disability
 Gender M Ethnic origin 02\White I Age Range D 35-49

un represented at present - may take legal advice at a later stage in the proceedings

Compliance is at the heart of Pact

- Your client's details are stored along with their representatives information.
 - You can keep "Post It" type notes about each client as aide memoires.
 - Pact undertakes a conflict check for you.
 - The information stored also provides vital LSC reporting data.
 - Once you store a representative's details they are available on all cases

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Case Summary Client Details **Records** Children

Select All

Work Type	Category	Record Name	Date	Time	Sel
Willingness	Phone Call Out	call to check if parties are willing - both were.doc	31/08/2012	18	
Willingness	Letter out	Confirmation of willingness.docx	01/09/2012	0	
Assessment	Letter out	Confirming mediation to progress.doc	04/09/2012	12	
Med.AIM Sole	Email Out	fixing next appointment.doc	09/09/2012	0	
Med.AIM Sole	Document	information form.pdf	16/09/2012	6	
		DOC Client self disclosure information.doc	16/09/2012	1	
Med.AIM Sole	Letter out	Composed Letter.doc	16/09/2012	0	
Med.AIM Sole	Notes	notes of a meeting.doc	16/09/2012	65	
Med.AIM Sole	Document	Memo of Understanding.doc	16/09/2012	0	
Med.AIM Sole	Letter out	CL Appointment letter.doc	16/09/2012	1	
Med.AIM Sole		Absence Policies.pdf	16/09/2012	0	
Med.AIM Sole	Notes	notes from first session.doc	16/09/2012	12	
Med P & F Co	Drafting Ag Prop	Confidentiality Agreement.doc	22/09/2012	6	

Pact makes record storage and retrieval unbelievably simple.

- By enabling you to select a “Work Type” you can immediately see how much work has been done on each stage of the case.
- As you store emails, attachments, letters, session notes, MOUs they are placed in chronological order.
 - You can retrieve any record with the click of a mouse.
 - You can print an index of every action on every case.
 - You can use your own or our standard letters.
 - You can write or email directly from Pact and store the records.
 - Invoice and bill with a click.

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Case Summary Client Details Records Children

First Name	Last Name	Date of Birth	Gender	School/Place of Education	Special Needs
Kate	Adams	27/01/1999	M	Heaton College	none

- Store key information about children of the family, including any special needs or medical issues
- Pact allows duplication of a key details such as addresses to prevent tedious repetition and save time wherever possible.

decameron software PACT Version 1.000 Session Notes Save and Close

In summary

- Designed for mediators
- Complete case control and matter management
- Really easy to use
- Saves valuable time and speeds up admin
- LSC compliant
- Prepares financial accounts
- Assists with marketing
- Flexible to adapt to your practice