eCASE ADR

Neutral Portal User Manual

v3.1.0

November 2024

OPEXUSTECH.COM

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1 About This Manual

Welcome to the Alternative Dispute Resolution (ADR) Neutral Portal User Guide. The Neutral Portal provides neutral party mediators access to necessary messages and case data to assist in processing ADRs. This manual provides details on how this portal works and actions available to you as a portal user.

1.1 In This Document

The following topics are discussed in this manual:

- Accessing the Portal
- Portal User Interface
- Case Tracking and Processing
- Event Creation and Tracking
- Using Attachments
- User Inbox and Sending Messages Using the Portal

1.2 Using This Manual

The following formatting conventions are used in this manual to highlight important information:

- *Italicized* text indicates a location, for example a particular *Folder*, *Tab*, or *Window*.
- **Bold** text indicates a specific user action, such as clicking a **button**.
- **Red** text is used in Notes to **bring attention to crucial information**
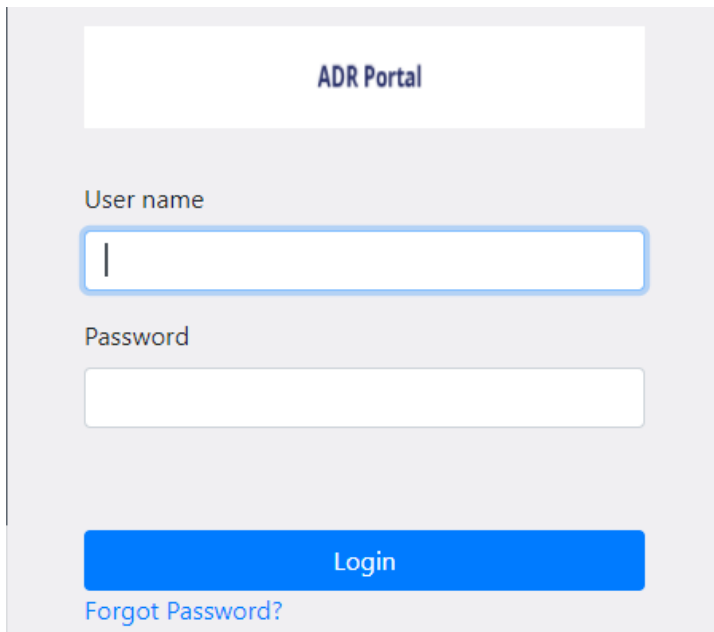
2 Getting Started

The following subsections provide instructions on accessing the Neutral Portal and beginning the workflow.

2.1 Accessing the Neutral Portal

When your account has been created, you will receive an email with Portal access information. An example log in screen is shown below:

To access the portal, provide your *User name* and *Password*, then click **Login**. After signing in, the dashboard appears as shown below.

See the following *Portal User Interface* section for details.

2.2 Portal User Interface

An example of the portal user interface is shown below.

The main areas of the *Dashboard* are described in the following table.

Ref	Element	Description
A	Navigation Bar	Use these buttons to navigate between the **My Forms** page and the **Home** page/dashboard.
B	My Forms	All forms currently assigned to you are listed in the *My Forms* list. Select the *Name* of the form you'd like to open to view the form in the workspace. See the next section for more details.
C	Unread Messages	This widget displays notifications for Unread Messages and a link to access the full inbox.

2.3 My Forms

The *My Forms* list on your dashboard provides a list of forms assigned to you. An example *My Forms* list is shown below and described in the following table.

My Forms

Name	Status	Case Number	Case Status
Randall Hamm	Returned for Correction	2021045	Transferred to Neutral
Randall Hamm	Assigned	2021049	Transferred to Neutral
Maya Smith	Assigned	2021046	Transferred to Neutral
Maya Smith	Assigned	2021048	Transferred to Neutral

Ref	Element	Description
A	Name	Name of the complainant listed on this case. Select a **Name** from this column to open the case for processing.

Ref	Element	Description
B	Status	Status of this assignment here in the portal. You can manually set this status based on actions taken on this case.
C	Case Number	Case number assigned to this case in the originating system, outside the portal.
D	Case Status	Status of this case as reported by the linked ADR system.

3 Workflow Case Tracking and Processing

The following subsections provide instruction on accessing assigned forms and moving through the case workflow.

3.1 Accessing Assigned Forms

The *Workflow Case Tracking and Processing* workspace is where you process cases you've received through the Portal. Access the Case Workspace from the *My Forms* list by clicking the *Name* associated with the form you'd like to open:

The *Workflow Case Tracking and Processing* workspace opens, as shown below. See the next section for details on this user interface.

3.2 Workflow Case Tracking and Processing Workspace

After opening a form, the Workflow Case Tracking and Processing workspace appears, as shown in the example below.

The portal workspace is divided into the following subsections:

Ref	Element	Description
A	Navigation Bar	Use these buttons to navigate between the **My Forms** page and the **Home** page/dashboard.
B	Actions Bar	Options to **Save** the form, mark an assigned case as **Case Concluded**, access your inbox **Messages**, and go **Back** to the home page. Each of these actions is detailed in the following subsections.

Ref	Element	Description
C	Attachment Details	A list of previously uploaded attachments (labeled as *Mediator Documents*) which you can click to view, and a **Select** button to upload additional attachments.
D	Complaint Information	Details about the case, including the *Complainant*, *Organizational Office*, *District*, *Geographic Office*, and *Scheduled Mediation/Facilitation Date* (if required). Use the **Date Picker** to select a *Scheduled Mediation/Facilitation Date:* Use the **Arrows** to change the month, or click the **Month YYYY** in the upper-left corner to select a month and year.
E	Events	A list of actions logged on the case in the Portal. These can be added manually by clicking **Add Event**. See the next section for more details on adding events.

3.3 Add Event

The Events workspace is where you'll log activity on this case, such as scheduling mediation or conducting debriefs. To add an event:

1. Log in to the Neutral Portal and open the desired case folder. Navigate to the *Events* subsection and click **Add Event**.

2. The Portal refreshes to display a blank Event entry in the *Event* workspace. Select the **Event Type** from the drop-down list.

Note: If you select Other, you will be prompted to fill out another field with the Event Type.

3. Use the **Date Picker** to select the *Event Date* (or enter the date manually).
4. You can also enter specific details about the event in the *Event Note* field.
5. Click **Save**.

6. The Portal refreshes and displays the *My Forms* workspace. Open the case folder from the list. The newly created event appears in the Events subsection, including the *Created Date*.

Events				
Event Type	Event Date	Event Note		Created Date
Coaching Concluded ⌄	05/04/2021	Event Note Event Note		05/04/2021
Schedule Discussion with Upper Manager ⌄	05/05/2021	test		05/05/2021
Conduct Interim Debrief ⌄	05/06/2021	Conduct interim debrief for documentation purposes.		05/06/2021

Add Event

3.4 Add Attachment

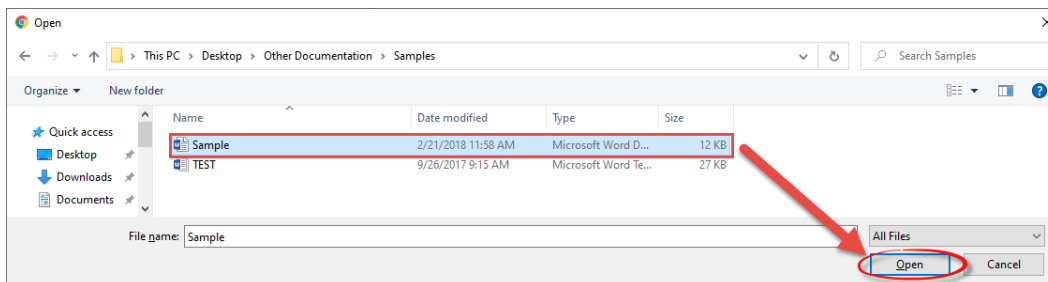While updating the ADR form, it may become necessary to add an attachment. To add an attachment:

1. Log in to the portal and open the desired case form. Within the *Attachment Details* section, click **Select**.

Attachment Details

Select

No Attachment(s) to display.

2. The *File Explorer* pop up window appears. Select the desired attachment and click **Open**.

Name	Date modified	Type	Size
Sample	2/21/2018 11:58 AM	Microsoft Word D...	12 KB
TEST	9/26/2017 9:15 AM	Microsoft Word Te...	27 KB

File name: Sample   All Files

Open   Cancel

3. The *Attachment Details* workspace updates and displays the selected attachment within the workspace.

Attachment Details

Select

Sample.docx (Mediator Documents)

3.5 Conclude Case

After the Portal actions and submissions are complete, you can conclude the case. To conclude a case within the Portal:

1. Log in to the Neutral Portal and open the desired case.
2. From within the case, click **Case Concluded**.

3. A confirmation message appears. Click **OK**.
4. The Portal refreshes and returns to the *My Forms* page. The case user receives an email notification indicating the case has been submitted/provided clarification. The case is now concluded and no longer appears on the *My Forms* workspace.

3.6 View Messages

To view messages associated with the case:

1. Log in to the Neutral Portal and open the desired case folder. Click **Messages**.
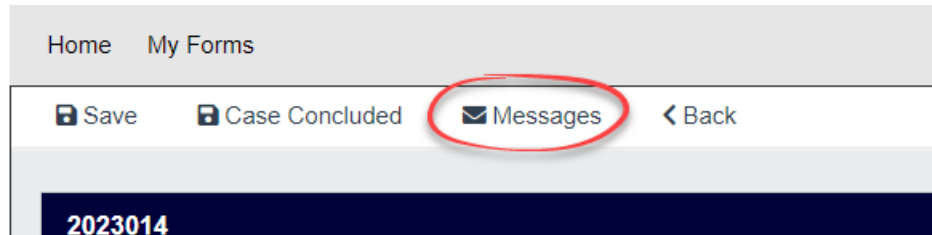
2. The page refreshes and displays the messaging inbox, with unread messages displayed in bold. Click the checkbox adjacent the desired message.
3. Click **View**.
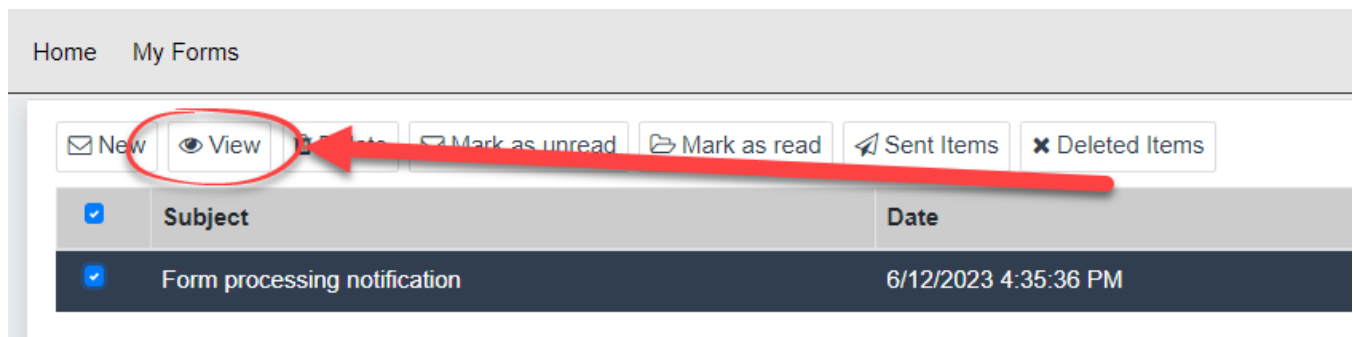
The workspace updates to display the full message. Within the workspace there are options to Reply to the message, Delete the message, mark the message as unread, and return to the case workspace. See the *Inbox* section for more details on working with messages.

Home My Forms	
⟳ Reply 🗑 Delete ✉ Mark As Unread ‹ Back	
Case Number :	2023014
Date sent :	Wednesday, November 6, 2024 11:49:27 AM
Subject :	Request Status
Message :	I would like an update on the status of my request. Thank you
Attachments :	**Attachment Details** ⌃ Sample document.docx

4   Inbox

The ADR Inbox Workspace is where you will communicate with other stakeholders related to your ongoing case forms. To access the Inbox, log in to the Portal. If you have an unread message, it will be listed in the *Unread Messages* list. You can click **Unread Messages** to navigate to your inbox, or click a message from the list to open it directly.
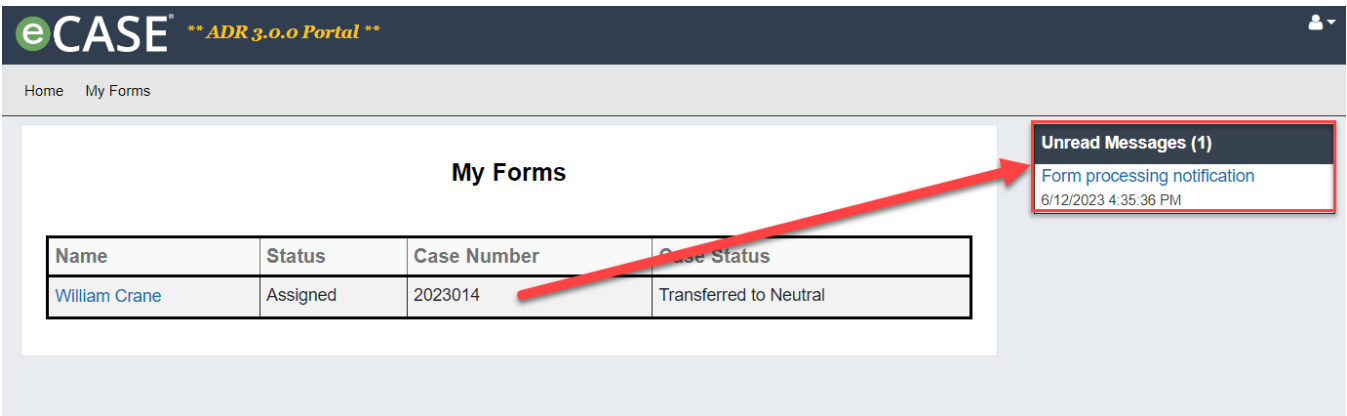
4.1   Inbox Interface

An example Inbox is shown below and described in the following table:
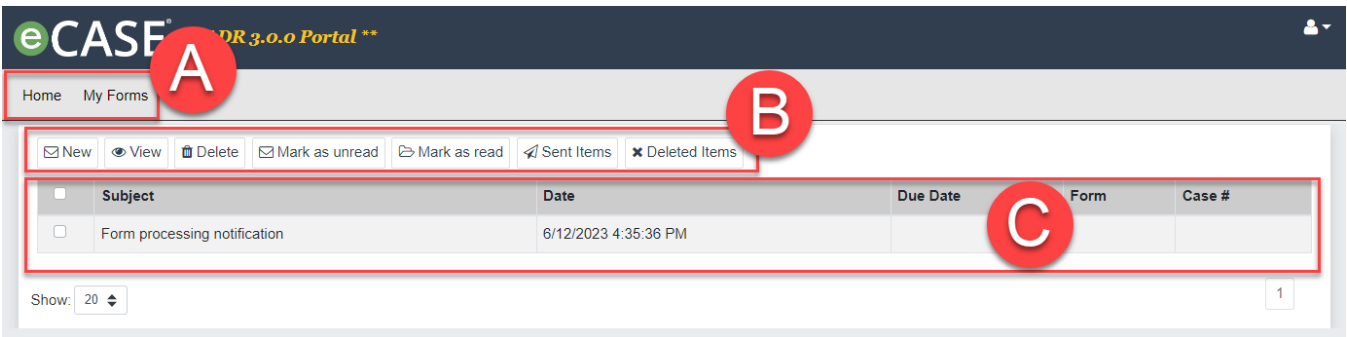
Ref	Element	Description
A	Navigation Bar	Use these buttons to return to the **My Forms** page or the **Home** page/dashboard**.**

Ref	Element	Description
B	Actions Bar	Create a **New** message, or take actions on an existing message by selecting it from the list and clicking **View, Delete, Mark as Read** or **Mark as Unread**. You can also filter your message list by clicking **Sent Items** or **Deleted Items**. Click **Inbox** to view the full, unfiltered list of messages.
C	Inbox Messages	The list of messages you've received in the Portal. This list may be filtered using the options in the Actions Bar.

4.2 Send Message

Follow the steps below to send a new message from the portal:

1. Log in to the Portal and open the Inbox. Click **New** from the Actions Bar.
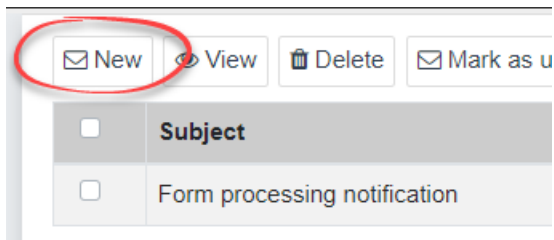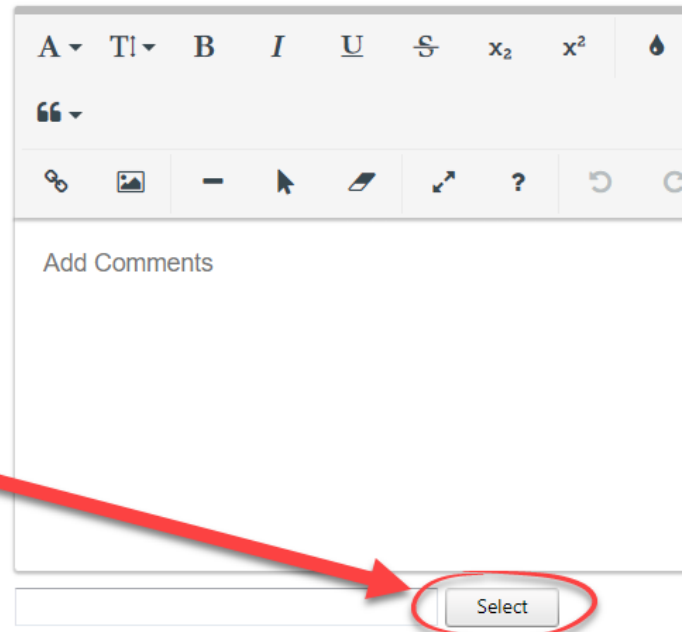
2. The Workspace updates to display the blank Message form. Select the **Request** from the drop-down list.

3. Enter the **Subject** of the message.
4. Configure the content of the message using the *Message* text editor field.
5. Click **Select** to upload any attachments, if desired.
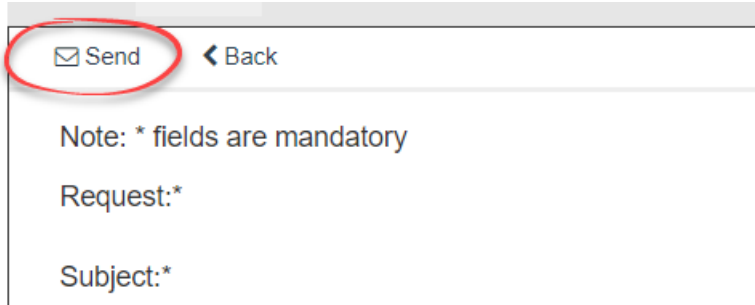
6. When you're finished configuring the message, click **Send**.

7. The page refreshes and opens to the Inbox. The message you sent will appear in the messages list.

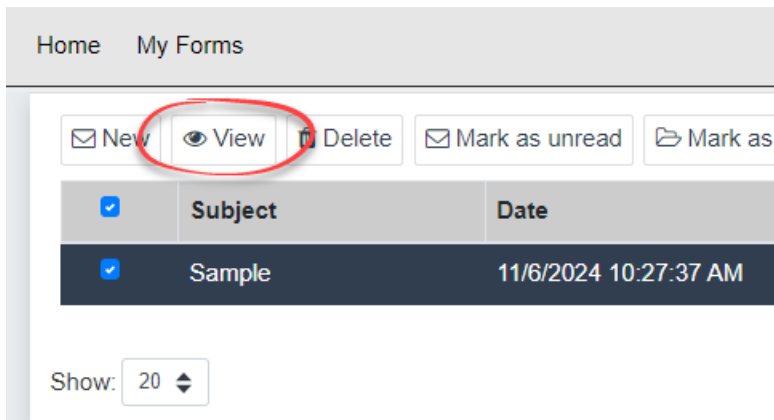The eCASE user responsible for the case will be able to view your message from the *Portal Messages* tab in ADR.
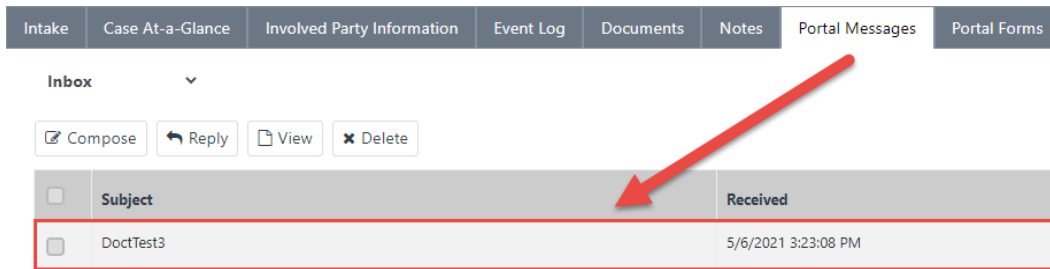
4.3 View Message

Follow the steps below to view a portal message:

1. Within the inbox, click the **checkbox** adjacent the desired message.
2. Click **View**.

3. The page refreshes to display the message. Here, there are: **(A)** a set of actions that can be applied to the message (**Reply**, **Delete**, and **Mark as Unread**), **(B)** the contents of the message, and **(C)** a list of any attachments sent with the message.

4.4 Delete Message

Follow the steps below to delete a message:

1. Within the inbox, click the **checkbox** adjacent the desired message.
2. Click **Delete.**

3. A confirmation window appears. Click **OK** to permanently delete the message. The inbox refreshes and the selected message is removed.

4.5 Change Inbox View

You can customize your inbox view to filter specific types of messages. From your Inbox, click **Sent Items** or **Deleted Items** to view only sent messages or only deleted messages, respectively.

You can remove the filter and view your full message list by clicking **Inbox.**