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| MT FAMILY TRANSITION PROJECT | | |
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| Case Checklist for Mediators | | |

# COURT-ORDERED CASES

# Before Mediation

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|  | Upon receipt of new case email from Katy, confirm that you are taking the case and that you do not have a conflict of interest with either party | |
|  | Schedule and perform individual prep sessions with each party. Prep sessions should include: | |
|  |  | the HITS assessment DV screening |
|  |  | rapport building |
|  |  | scheduling and reminding that they have access to free legal advice & a CS consult |
|  | Look up the case in the [Public Access Portal](https://courts.mt.gov/Courts/portals) to get a sense of the case and identify any filings you would like to see | |
|  | Request case filings from the Clerk of Court’s Office | |
|  | Once mediation is scheduled, e-file a Notice of Scheduled Mediation with the correct district and send a copy to Katy, the legal advisors, and the CS consultant | |
|  | Send a Notice of Scheduled mediation for each subsequent mediation session so the court and professionals are aware of the progress on the case. | |

# After Mediation

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|  | If an agreement was reached, capture it using the appropriate paperwork and collect e-signatures from parties. |
|  | Write your Mediator’s Report |
|  | E-File Mediator’s Report and agreements signed by parties (if applicable) with the correct district and send copies to Katy, the legal advisors, and the CS consultant |
|  | Use invoice template to track hours each month. Email to [mediate@mtlsa.org](mailto:mediate@mtlsa.org) and cc Katy on or before the 5th of each month. |

# SELF-REFERRED CASES

# Before Mediation

|  |  |  |
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|  | Upon receipt of new case email from Katy, confirm that you are taking the case and that you do not have a conflict of interest with either party | |
|  | Schedule and perform individual prep sessions with each party. Prep sessions should include: | |
|  |  | the HITS assessment DV screening |
|  |  | rapport building |
|  |  | scheduling and reminding that they have access to free legal advice & a CS consult |
|  | Look up the case in the [Public Access Portal](https://courts.mt.gov/Courts/portals) to get a sense of the case and identify any filings you would like to see | |
|  | Request case filings from the Clerk of Court’s Office | |
|  | Once mediation is scheduled, inform Katy, the legal advisors, and the CS consultant | |

# After Mediation

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|  | If an agreement was reached, capture it using the appropriate paperwork and collect e-signatures from parties. Be sure to write “agreement mediated through the Montana Family Transition Project” somewhere so the court knows we helped. Share a copy with Katy, the legal advisors, and the CS consultant. |
|  | If an agreement was reached, ensure at least one of the parties understands the filing process and takes responsibility for submitting everything. |
|  | If no agreement was reached, write a Mediator’s Report so that both parties have proof that they participated in mediation. Direct parties back to the court or other appropriate resources and inform Katy, the legal advisors, and the CS consultant. |
| ☐ | Use invoice template to track hours each month. Email to [mediate@mtlsa.org](mailto:mediate@mtlsa.org) and cc Katy on or before the 5th of each month. |