

## Case Management Instructions for Neutrals

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## Viewing a Case Site

You can access all of your cases through the portal: [drcases.healthlawyers.org](http://drcases.healthlawyers.org). You can access a particular case by clicking on the link at the bottom of any system-generated message, which will have the case name and number.

Unless you are already logged in, the system will prompt you to enter a user name and password. Please enter the credentials you used to create your neutral profile. Do not create a new user name! If you cannot remember your user name or password, there are tools on the Login screen to help you or [we can assist you](#).



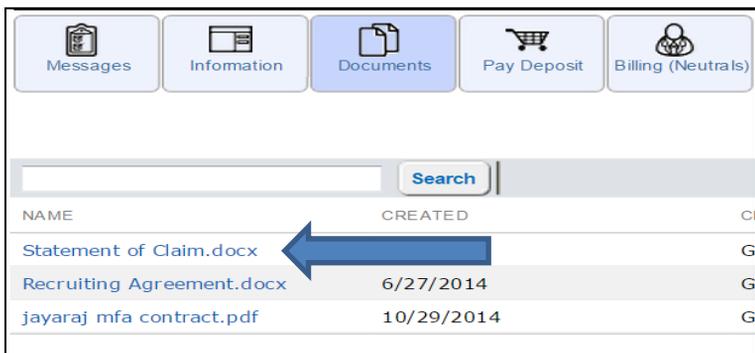
## Learning about the Case

### Documents

On the case site, click on the Documents button to view all documents pertaining to the claim



To open a document, click on its name.



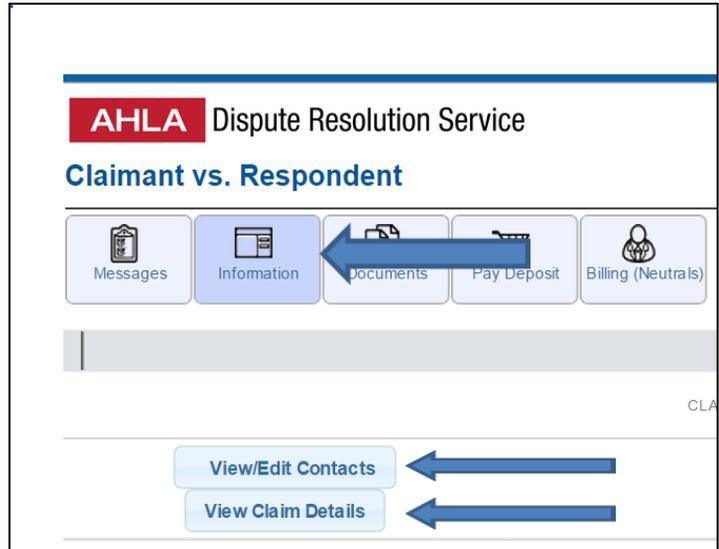
NAME	CREATED	
Statement of Claim.docx		G
Recruiting Agreement.docx	6/27/2014	G
jayaraj mfa contract.pdf	10/29/2014	G

## Contact Information

Click on Information and then on View/Edit Contacts. Anyone with access to the site can add or edit this information. Please ask representatives to keep their contact information current.

## Request for Relief (and other claim information)

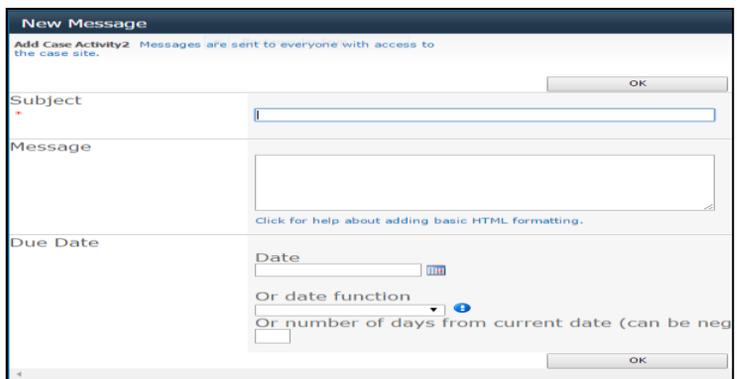
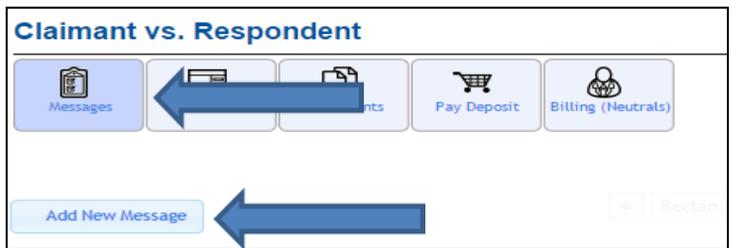
Click on Information and then on View Claim Details. Only AHLA staff can edit this information.



## **Sending Messages**

To send an email to all party representatives (including any associates or assistants who have requested to be on the notification list) click on Message and then on Add New Message.

When the New Message window appears, fill in the subject and body of the message and a due date (if appropriate) and click OK.



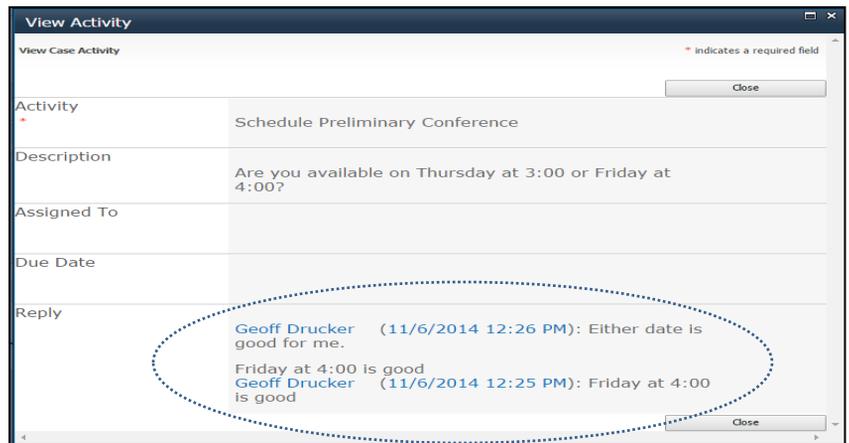
If the participant list is long, it may take close to a minute to complete the action. Please do not click on OK multiple times as this may result in the same message being sent multiple times.

Since you are on the distribution list, you should receive a copy of every message you send. If you do not receive a copy, [please let an administrator know](#). We can quickly resolve the problem.

Under the Messages tab, the system retains a copy of all communications sent through the system. By clicking on Reply to Activity, a party can respond directly to your request. You can view all responses to a message by clicking on View Activity.

TITLE	DESCRIPTION	DUE DATE
<a href="#">View Activity</a> <a href="#">Reply to Activity</a> 	Schedule Preliminary Conference	7/9/2014
<a href="#">View Activity</a> <a href="#">Reply to Activity</a>	Provide Exhibit List	6/5/2014

The reply feature is especially helpful if you are trying to find a mutually convenient date for a hearing because all the responses appear together for easy review.



The screenshot shows a 'View Case Activity' window. The activity is titled 'Schedule Preliminary Conference'. The description asks: 'Are you available on Thursday at 3:00 or Friday at 4:00?'. The 'Reply' section contains two responses from Geoff Drucker: one dated 11/6/2014 at 12:26 PM stating 'Either date is good for me.', and another dated 11/6/2014 at 12:25 PM stating 'Friday at 4:00 is good'. A dotted oval highlights the replies.

### Scheduling Conference Calls

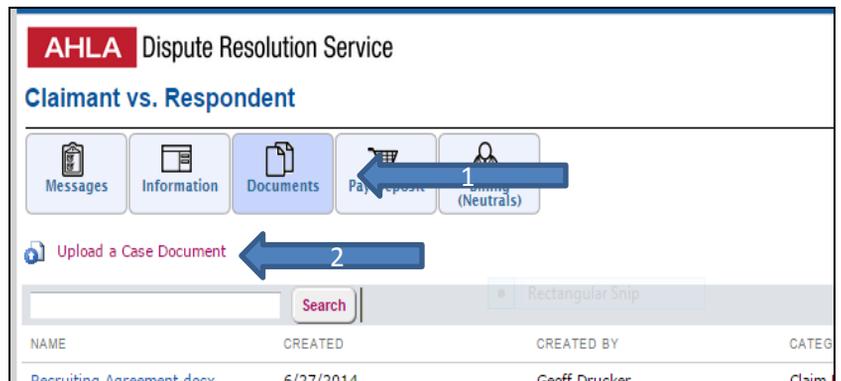
Upon request, we will provide a conference call line exclusively for use on your case and instructions for using it. We will deduct the cost of conference calls from the amount on deposit for the claim. Please note that, by default, conference calls are recorded. Hit \*2 on your phone during a call to turn this feature off.

### Managing Documents

#### Adding a Document to the Site

Click on Documents and then on Upload a Case Document

The file size limit is 50-100mb depending on the characteristics of the document



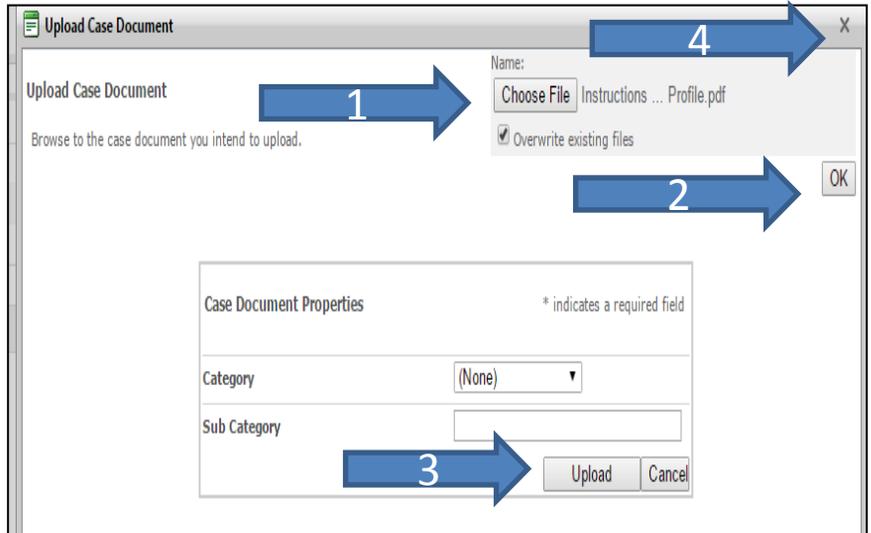
The screenshot shows the AHLA Dispute Resolution Service interface. It features a navigation bar with buttons for Messages, Information, Documents, Pay Request, and Hearing (Neutrals). A blue arrow labeled '1' points to the Documents button. Below the navigation bar, there is a link 'Upload a Case Document' with a blue arrow labeled '2' pointing to it. A search bar and a table of documents are also visible.

NAME	CREATED	CREATED BY	CATEG
Recruiting Agreement.docx	6/27/2014	Geoff Drucker	Claim

Select a file from your computer and then click on OK. Entering a Category or Sub Category is optional.

Click Upload to complete the action.

Click on the X to exit the Upload screen.

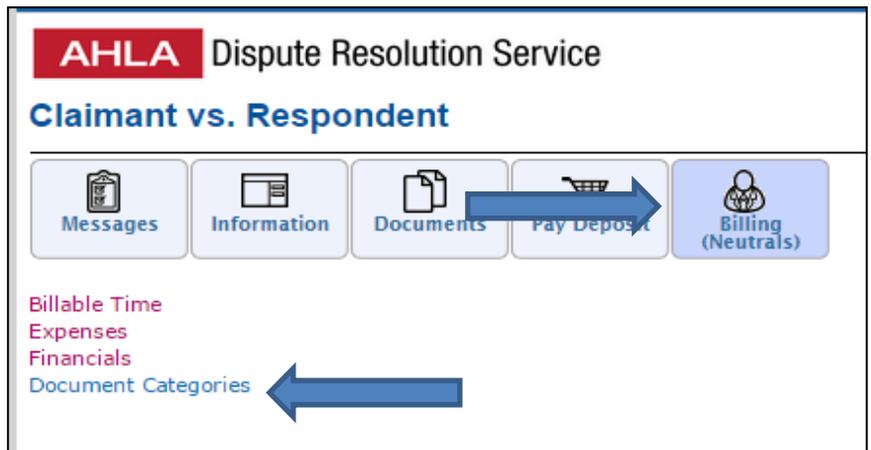


The system will send an email to all representatives, and to you, stating that a *new* document has been uploaded. (If a new version of the same document is uploaded, no alert will be sent). If you do not receive an alert, [please let an administrator know](#). We can quickly resolve the problem.

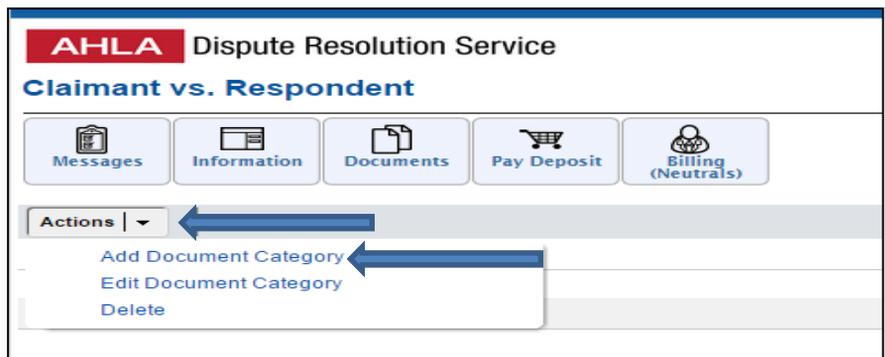
### Organizing Documents on the Site

If a claim involves numerous documents, you can organize them into categories and sub-categories for easy access.

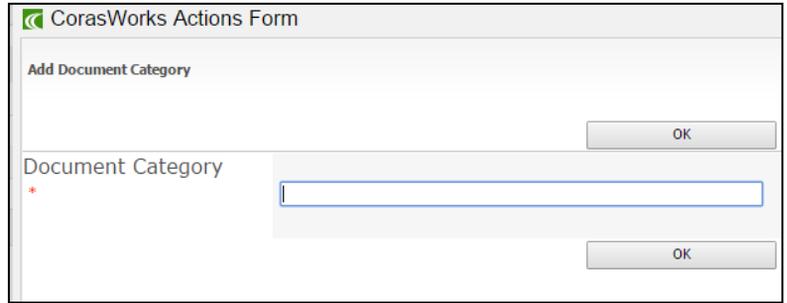
Click on Billing (Neutrals) and then on Document Categories



Next, click on Actions and then on Add Document Category



Add the category name and click on OK.



CorasWorks Actions Form

Add Document Category

Document Category \*

OK

By default, documents appear in the order in which they were uploaded (most recent to least recent). Click on Category to order the documents by category. Click on Sub Category to order by sub category. Clicking once puts the categories into alphabetical order; twice into reverse alphabetical order.



CATEGORY	SUB CATEGORY ↑	ACTIVITY
Status Reports		
Status Reports		
Arbitrator Acceptance Documents		Appointment as Arbitrator
Arbitrator Acceptance Documents		
Arbitrator Acceptance Documents		
Arbitrator Acceptance Documents		
Claim Documents	Amended Statement of Claims to be Arbitrated	
Amended Claim	Amendment Hospital Agreement	
Amended Claim	Amendment Hospital Agreement	
Amended Claim	Amendment Managed Care Hosp Agrmnt	

## Requesting Deposits

You may request a deposit at any time. Just let us know how much you would like each party to provide, and by when. Deadlines are strongly recommended.

As background, parties can provide deposits online through PayPal, by check made payable to AHLA, by wire transfer, or by providing a credit card number over the phone.



AHLA Dispute Resolution Service

University of Pittsburgh Medical Center vs. Highmark Inc., Claim No. 2515

Messages Information Documents Pay Deposit Billing (Neutrals)

Pay by PayPal

Pay by Wire Transfer

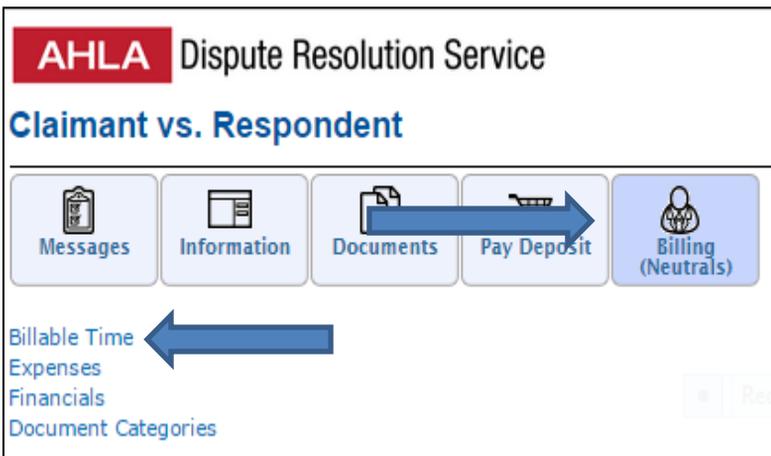
Pay by Check

Pay by Phone

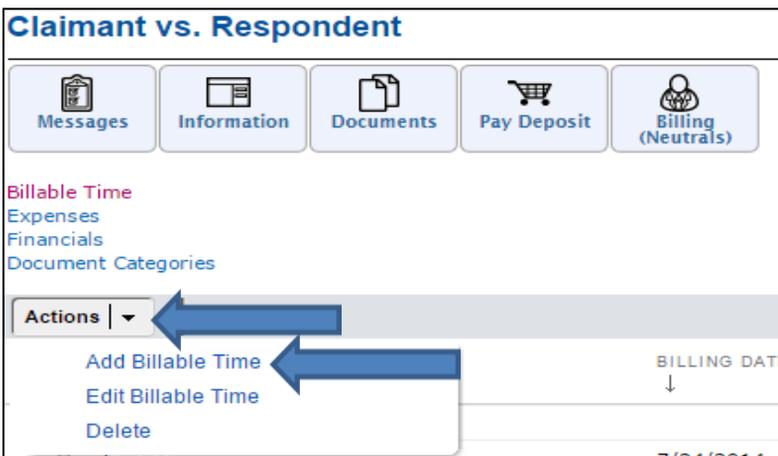
See [Viewing Deposits and Withdrawals](#) below to learn how to track the amount on deposit at any time.

## Billing for Time

Click on Billing (Neutrals) and then on Billable Time.

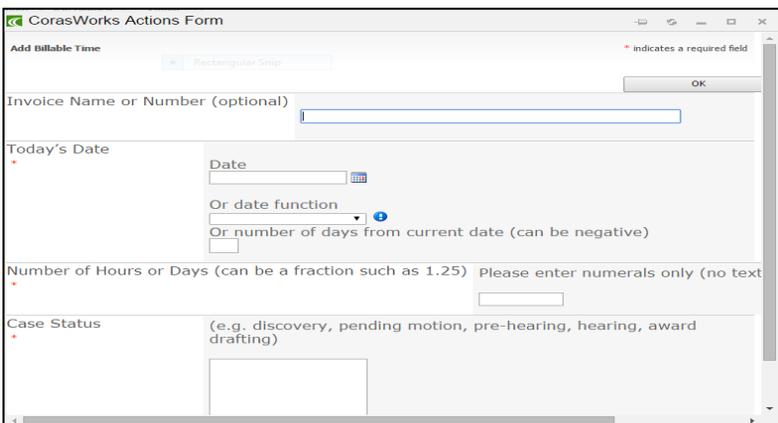


Next, click on Actions and then on Add Billable Time.



Complete the fields and click OK.

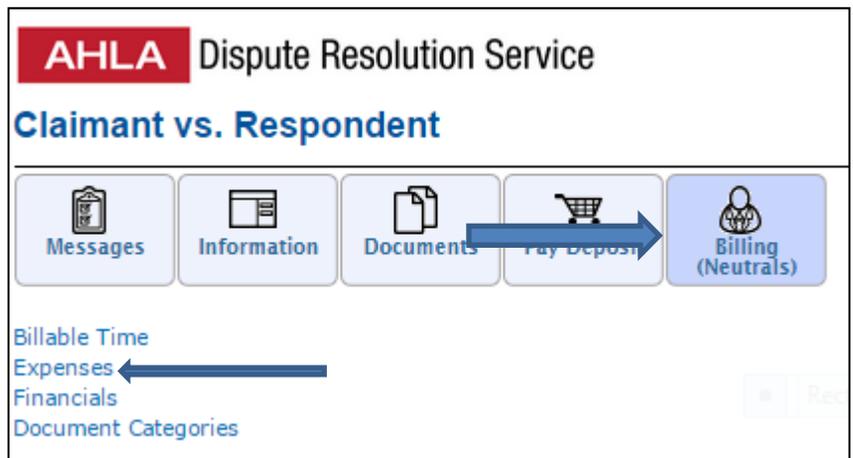
By default, the system calculates the amount owed at the primary daily or hourly rate listed on your neutral profile. If you wish to bill at a lower rate, please let us know and we will make the necessary adjustment.



Alternatively, you may submit a written invoice to [DRS@healthlawyers.org](mailto:DRS@healthlawyers.org) and we will input the information for you.

## Billing for Expenses

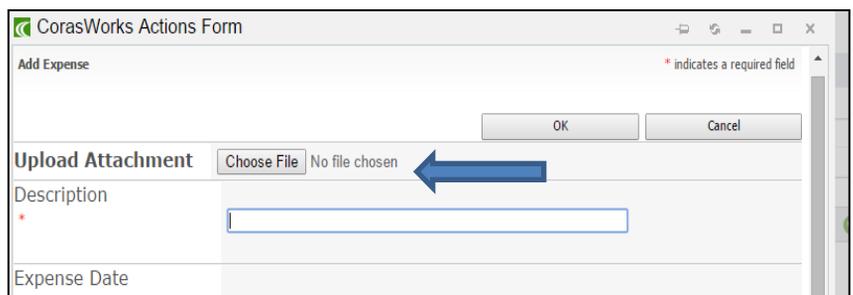
Click on Billing (Neutrals) and then on Expenses



Next, click on Actions and then on Add Expense



A receipt is required for travel expenses such as hotel stays, meals, and airline tickets. No receipt is required for office expenses such as conference calls or postage.

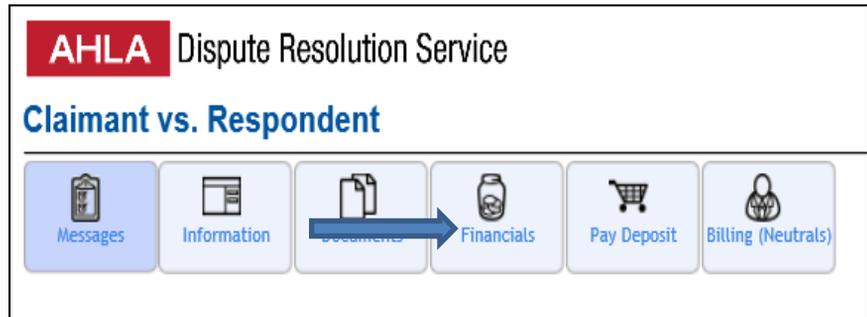


Alternatively, you may submit a written invoice to [DRS@healthlawyers.org](mailto:DRS@healthlawyers.org) and we will input the information for you.

## Viewing Deposits and Withdrawals

The case management systems provides up to date information about how much money is on deposit, what invoices have been paid, and what invoices are outstanding.

Click on Financials



A spreadsheet showing all recorded deposits and invoices will open up.

The screenshot shows a spreadsheet titled "Print Financials" with a blue arrow pointing to the text "Click here to print the spreadsheet". The spreadsheet is divided into two sections: "Claim Financials (Paid)" and "Claim Financials (Submitted)".

**Claim Financials (Paid)**

Arbitrator	Description	Date Submitted	Date Paid	Amount
<b>Deposits</b>				
	Deposit	2013-08-09		\$1,000.00
				Total Deposits: \$1,000.00
<b>Billable Time</b>				
				Total Administrative Fees: \$-0.00
				Total Billable Time: \$0.00
<b>Expenses</b>				
				Total Expenses: \$0.00
				Available Balance: \$1,000.00

**Claim Financials (Submitted)**

Arbitrator	Description	Date	Amount
<b>Billable Time</b>			
Geoff Drucker	Pre-Hearing Conference	2013-08-09	\$900.00
			Total Administrative Fees: \$-162.00
			Total Billable Time: \$738.00
<b>Expenses</b>			
Geoff Drucker	Conference Call (Provider: AT&T Category: Miscellaneous (tips and others))	2013-08-09	\$27.00
			Total Expenses: \$27.00
			Unpaid Balance: \$927.00

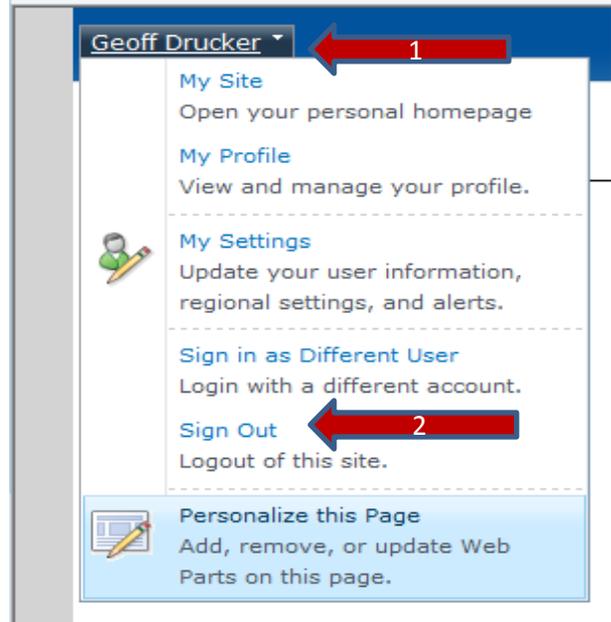
By design, the spreadsheet will not reveal the source of deposits. This is to prevent a party from claiming that a neutral was biased in favor of the side that paid more, or paid more promptly.

We strongly discourage neutrals from incurring billable time or expenses if insufficient funds are on deposit to cover these costs. **So please view this spreadsheet often as a claim progresses.**

## Signing Out

To minimize the risk of an unauthorized person accessing a case site, please sign out at the end of each session.

For security reasons, the case management system will automatically log you out if there is no activity on the site for 30 minutes.



## Assistance

If you would like help using the case management system, please contact:

Johnnie M. Mickens | Case Specialist, Dispute Resolution Service  
(202) 833-0776 / [JMickens@healthlawyers.org](mailto:JMickens@healthlawyers.org)

or

Carine Brice | Manager, Dispute Resolution Service  
(202) 833-0762 / [CBrice@healthlawyers.org](mailto:CBrice@healthlawyers.org)

Thank you for serving as a neutral!