Family Law Software

Quick Start Guide for Mediators

You may wish to print out this Quick Start guide and follow along in it as you make entries in the software.

This guide should take just a few minutes to go through and will enable you to start using Family Law Software quickly and effectively.

The first time you install the software, it will ask for your KeyCode, then your Professional Information. Please install the software now, if you have not already done so.

The steps below will walk you through the following key items:

- Starting a new client file.
- Quickly calculating child support.
- Seeing how the parties' incomes compare to their expenses.
- Helping the parties divide the property.

1. Starting a new client file.

At the top of the screen, click the Files tab, as shown below.

| Home | Files | Lawyer | Planner | Guidelines | Negotiate | Calculators |
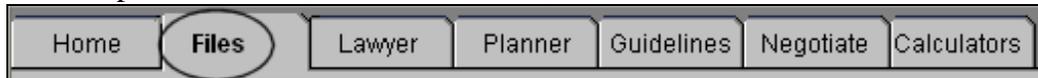
Look at the buttons on the screen: New, Open, Save, Save As, and Delete. Click:

New .

A dialog box will appear, as shown below.

New Client File

Enter the names of each party (optional):

Party's Name (first, last): Herman   Training

Other Party (first, last): Lily   Training

OK

Enter the filename for the new client file:

File Name: Training

File will be saved in folder:

My Documents\Family Law Software\   Change Folder

To put the file in a different folder, click "Change Folder."   Cancel

Enter "Herman" and "Lily" Training, as shown above.

If you wish to store your files on a network drive, click "Change Folder" and navigate to the folder you wish to use.

When you are ready, click "OK."

2. Entering Background Information.

Click on the Mediator tab (you may already be there).

Home | Files | **Mediator** | Planner | Guidelines | Negotiate | Calculators
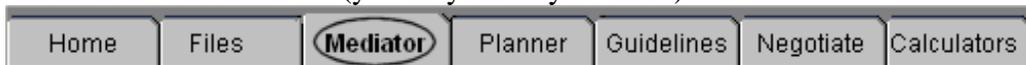
For the entry "The state of filing of action," select your state. Select your state as well for the state where the party lives. (The software has state tax tables for all 50 states.)

3. Entering a Child.

At the bottom of the screen, click the "Add Child" button to enter a child, and enter child information as shown. You only need to enter the child's name and date of birth. (You may change the other fields if you wish.)

To enter a second child, and more children, you would click "Add Child" again for each child you wish to enter.

4. Entering Quick Child Support.

If you are in one of the states for which we calculate child support, you will see a link on the left labeled "Quick Child Support," as shown below. Click this link now.
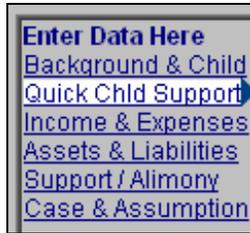
On this screen, you will see the key entries for calculating child support.

Enter wages of $100,000 per year for Herman and $20,000 per year for Lily.

(You may enter wages weekly, monthly, etc., by clickingon "Per Year.")

Scroll down, and you will see the child support result.

You may enter the other relevant entries.

It's as quick and easy as that.

Note: Entries you make on other screens, such as mortgage information, affect taxes and thus may affect child support in some states. In these cases, the bottom line number on this screen will update automatically to reflect these entries on other screens as well.

5. Income, Expenses, Taxes and the Bottom Line.

You may enter both parties' incomes and expenses. The software will automatically calculate federal taxes, estimate state taxes, and show you the after-tax bottom line.

Click the link on the left labeled "Income & Expenses."
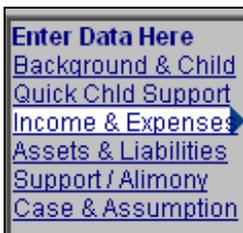
The software can show the expenses for one party, the other party, or both parties.

Let's enter some expenses for Lily.

If the title of the screen is "Income & Expense for Both Parties," or "Income & Expense for Herman," then change the screen by clicking the link at the top that says "Click here for Lily."

Now the title of the screen will be "Income & Expense for Lily."

Go through this screen and enter wages, and a few other items, such as non-wage income, mortgages, and other expenses.

Then scroll to the bottom of the screen.

You will see Payments, Taxes, and Lily's bottom line.

You can see how the party will be doing. You may also change alimony or child support and instantly see the impact of that change on taxes and the after-tax bottom line.

Note: A party may have negative federal income taxes if the Earned Income Credit applies.

You can scroll to the top and click "Click here for both parties."

You will then see both parties side by side. Now scroll back to the bottom. You may easily change child support, spousal support, or filing status, and see the impact on both parties.

The software gives you this very powerful ability to enter incomes and expenses, ask "what if," and see the bottom line all on one screen.

6. Entering Assets & Liabilities.

Click the link on the left for Assets & Liabilities.
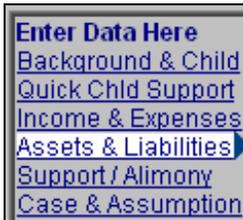
Click the buttons and enter some assets, including a real estate asset.

If you have not entered a real estate asset yet, enter the information shown below.

**Note:** The software guesses at the mortgage interest rate, using a recent current rate. This allows it to amortize the mortgage. Then it can automatically estimate the interest deduction for tax purposes. If you wish, you may enter the precise interest rate. To do that, click the "more info" link to the right of the data entries, enter the rate, then click the "back" button to get back to the top level screen.

7. Helping the Parties Divide the Property.

Now let's help the parties divide the property (perform an equitable distribution). The software has a built-in worksheet for doing this.

Let's take a look.

In the list of screens at the left, click the "Property Division" link, as shown below.
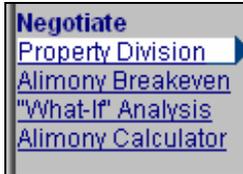
You will see a screen that looks like this:

The totals are at the top.

Below them, you will see one line listed for each property.

To allocate or divide each property, you may change either the percent (50% in the image above) or the dollar amount ($75,000 in the image above). When you do that, the totals at the top will update automatically.

Now click the "50" opposite 124 Main St as shown above, and make it "25." Then press <Enter>. The totals at the top of the screen will update instantly.

This very powerful ability lets you quickly try different property divisions until you reach one that is acceptable to the parties. This screen helps parties focus on the property division issues from a practical perspective and get to agreement more readily.

Note at the top of the screen a link that says, "Click here to set Property Division Screen options." If you click that link, you'll see options to display separate property; to display more columns of information about each asset; to display retirement property and non-retirement property separately; and to display the equalization payment -- how far away you are from a 50/50 division.

Now let's view the Property Division Report.

Scroll to the bottom of this screen. You will see three links. Click the left link as shown below.

Reports:

Click for Reports: Marital Property Division; or All Property Division; or Marital Property - After Tax Effects

On the screen, a report on the division of marital property will appear (as shown below).

	Herman Amount	Lily Amount	Total Amount
Real Estate Equity			
124 Main St.	$37,500	$112,500	$150,000
Total Real Estate Equity	$37,500	$112,500	$150,000
Subtotal Non-Retirement	$37,500	$112,500	$150,000
Subtotal Retirement	$0	$0	$0
Total Assets	$37,500	$112,500	$150,000
Total Debts	$0	$0	$0
Total Property	$37,500	$112,500	$150,000

Note: "Total Amount" column may not add due to rounding.

Division of Marital Property:

This is a very useful report. It clearly says, "This is our proposal." Or, "this is what we have been talking about. Take it home to study it."

At the top of this screen is a link to set options. You may control the formatting and appearance of this report with those options.

8. More Reports.

For an actual case, you will continue entering the rest of the client information. Now we will look at some of the financial projections.

Looking at the list of screens at the left, click the screen labeled "Budget Report" in the "Reports" group, toward the bottom of the screens.
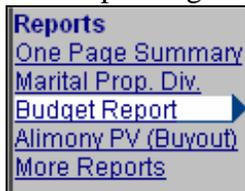
You will see a report that shows on a line-by-line basis how we got the "After-Tax Cash" number that we saw earlier.

	Herman Monthly	Lily Monthly
Income		
Gross Wages	$12,500.00	$2,500.00
Total Wage and Non-Wage Income	$12,500.00	$2,500.00
Support Received		
Child Support Received	$0.00	$1,257.00
Alimony Received	$0.00	$1,000.00
Total Support Received	$0.00	$2,257.00
TOTAL INCOME	**$12,500.00**	**$4,757.00**
Mortgage Payments		
124 Main St.	$0.00	$2,540.00
Total Mortgage Payments	$0.00	$2,540.00

This nicely formatted report will also help clients understand where they really are financially. This can help the parties have a more peaceful relationship after the divorce, make smarter decisions, and increase their overall ability to move forward.

Reports like this can be very powerful in persuading clients to make necessary changes and compromises.

Now click the link labeled Support/Alimony.

Enter Data Here
Background & Child
Quick Chld Support
Income & Expenses
Assets & Liabilities
Support / Alimony
Case & Assumption

If you enter an alimony amount, you will see the present value of the proposed alimony payments, on an after-tax basis.

2. Alimony:
Amount:　　1,000　per　Month
Start Month/Year:　1　/2009　Last Month/Year:　12　2012
Who will be paying:　Herman
Present value to Herman:　28,346　based on pre-tax discount rate of:　5.00　%
Present value to Lily:　39,893　based on pre-tax discount rate of:　5.00　%
[more info]　Click here to enter modified levels of Alimony.

The numbers are different for the two spouses, reflecting the fact that they are in different tax brackets.

The child support and spousal support you enter on this screen are used on the
Income & Expenses screen and the Budget Report.

Now let's look at some additional reports.

In the list of screens at the left, click "More Reports" (near the bottom).
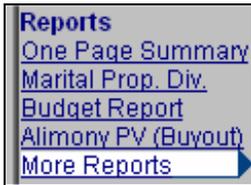
You will see a list of additional reports. Click the links to view the reports.

9. Getting Technical Support.

If you have any questions, click the Home tab, then Tech Support, as shown
below.

We have several means of supporting you: by phone, e-mail, and by sending your
file. Of these, getting support by sending your file is probably the best.

To send us your file, just click the "Send Your File" button as shown above.
(You will have an option to strip identifying details to preserve client
confidentiality.)

After the file is transmitted -- no e-mail necessary! -- you will be prompted to
type your question.

We will then be able to see what you have done so far, and to respond
accordingly. We find this is a very effective way for us to support you as you use
the software.

10. First Case!

Needless to say, for actual clients, there is more data you will enter, more financial reports you will want to print, and more "what-if" analysis you will want to do.

But this Quick Start guide should be enough to get you started entering data and using the software.

Now it's time to plunge in and enter your first case!

We are sure this software will make you more effective in your practice and enable you to help your clients reach better outcomes.

We expect that you will have questions as you get going, and we look forward to hearing from you.