

Instructions for completing federal form

Local Summary Access & Visitation

Each year the Office of the Executive Secretary/Division of Dispute Resolution Services (OES-DRS) awards contracts to coordinate mediation in local Juvenile and Domestic Relations (JDR) courts. A portion of the JDR coordinator program is funded by a grant from Virginia Department of Social Services (VDSS). Grant reporting requires DRS to submit quarterly demographic data for JDR cases using the Local Summary Access and Visitation (A&V) worksheet. To fulfill this obligation, OES-DRS requires each contract coordinator submit demographic data for cases mediated in the courts. The OES-DRS office aggregates the data and forwards it to VDSS who, in turn, forwards the report to the federal level.

How to collect the data

DRS created a demographic survey template that contains all the data elements necessary for an individual record in the A&V. This template may be used as a stand-alone or it can be incorporated into another data sheet that is to be completed by the client.

Regardless of how the coordinator chooses to distribute the form to clients, it is important that data be collected **before** the mediation begins. Because some mediations may end abruptly, having the data up-front ensures that these cases can be noted on the A&V report. Most mediations, whatever the outcome, need to be recorded as a measure of work. The few exceptions are explained in the next section.

A copy of the most current demographic survey template appears at the end of these instructions.

What **not** to report

DSS is interested only in mediations involving custody and/or visitation. Additionally, the mediation must involve at least one non-custodial parent (NCP.) The NCP will be either mother or father OR both mother and father (for further guidance see #7 under "Explanation of Questions.") Grandparents, aunts, uncles, or any other person besides mother or father **cannot** be a NCP. Consequently, some mediations are not appropriate to report. Do **not** report mediations on the A&V if:

- the only issue mediated was support;

- there was no NCP (For example, the only participants were grandparents and/or legal guardians); or,
- both parents were custodial and the grandparents/other parties were trying to gain custody/visitation of the child. In this scenario there was no non-custodial parent going into the mediation.

Recording results of the mediation

1. Open the Survey Monkey reporting instrument.
2. Fill in or mark the most appropriate answer for each question shown.
3. Coordinators may receive links to results summaries for cases entered listing them as coordinator. Contact Jon Lamp at jlamp@vacourts.gov for more information.
 - a) Remember:
 - Because income is self-reported with no documentation, income data may not be reliable.
 - Support only mediations are not recorded. If you have a large number of support only mediations, a complete demographic profile of your clients is not reflected in this report.

Explanation of Questions

- 1. DATE THE MEDIATION ENDED**
 - a) Enter the date the mediation concluded. This date will be used to filter the results of the quarterly reports, so it is especially important this date is accurate.
- 2. WHICH COORDINATOR REFERRED THIS CASE?**
 - a) Select the coordinator that referred this case.
- 3. CASE OR REFERENCE ID**
 - a) Use some identification, other than the court case number, associated with the case should there be an audit or a question concerning the data. An internal reference number is appropriate.
- 4. NUMBER OF CHILDREN**

- a) The number of children refers to those **about whom the mediation was conducted**. The parents may have other children by other partners, or other children together, but those should not be included in this count.

5. WAS A PARENTING PLAN DEVELOPED?

- a) If an agreement was reached in mediation, mark “Yes”. Mark “Yes” even if custody was the only issue mediated. If agreement was not reached, mark “No”.

6. AS A RESULT OF THE MEDIATION, WHICH OF THE FOLLOWING ARE TRUE?

- a) “Will the non-custodial parent (NCP) have more time with the child as a result of this mediation?” DSS wants to know how many NCPs increased their time with their children, due to mediation. For information on determining the NCP, see the explanation for question 7 starting below.
- b) Mark the answer that is most applicable. If father was non-custodial at the beginning of the mediation and his access to the child increased, then mark “The non-custodial father’s parenting time increased”. If mother was NCP at the beginning of the mediation and her access to the child increased, mark “The non-custodial mother’s parenting time increased”.
- c) If the NCP’s access to the child did not increase due to mediation, select “Neither of the above options are true”.

7. DID AT LEAST ONE NON-CUSTODIAL PARENT PARTICIPATE IN THIS CASE?

- a) The non-custodial parent (NCP) is the parent who does not have physical custody of the child. *For a case to be included in this report, there should be at least one NCP. If the answer to this question is “no”, the user will be taken to the disqualification warning page where they will be given the option to change their answer. If the user continues without changing their answer, they will be sent to the disqualification page and that survey will not be included in the report.*
- b) This is the parent who was the NCP **at the beginning of the first mediation session**. If the NCP is different at the mediation’s conclusion, still list the person who was the NCP at the beginning of mediation as the NCP. For the purposes of reporting on this form, the following definition for NCP should be used:
 - i) **A grandparent or legal guardian cannot be the NCP.** (See “What not to report” at the beginning of these instructions.)

- ii) In cases of joint physical custody, the NCP is:
 - (1) Parent with whom the child spends the least time;
 - (2) Parent who lives at the address of record for the child;
 - (3) If the time is truly evenly divided, the parent who pays support; or,
 - (4) If neither parent pays support to the other, the default is father .
- iii) For split physical custody designate both parents NCP, as each will be the NCP of at least one child. In this scenario there must be two or more children.
- iv) If a grandparent or legal guardian has sole physical custody at the beginning of the mediation, designate **both** father and mother as NCP.

8. FOR VERIFICATION, PLEASE SELECT THE ANSWER XXXXX

- a) This question is intended to weed out automated survey takers. If the answer to this question is wrong, the user will be taken to the disqualification warning page, where they will be given the opportunity to change their answer. If the user continues without changing their answer, they will be sent to the disqualification page and that survey will not be included in the report.
- b) These questions are randomized, so it is important to read the question and answers carefully.

9. (As well as questions 15,22, and 29) DESCRIBE THE NATURE OF THIS PARTY'S RELATIONSHIP TO THE CHILD(REN)

- a) Mark the party's relationship to the child. See the explanation of question 7 for more information on determining the NCP for this report.
- b) Grandparents, legal guardians, and any other parties who completed a demographic sheet are to be entered.
- c) If there are multiple grandparents and/or legal guardians, report each one on a separate party entry page.
- d) Do **not** report a guardian ad litem, attorney, or CASA worker who attended the mediation.

10. (As well as questions 16, 23, and 30) WHAT IS THE YEARLY INCOME OF THIS PARTY?

- a) Income is for the individual only, not the household. New spouse's income should not be reported, just as it is not a factor in child support calculations.
- b) Mark income for **every** party in the mediation. If both grandparents participate in the mediation, each should list their individual income.
- c) Assure parties their answer does not affect support computations. As the data are anonymous, income cannot be traced to specific individuals.

11. (As well as questions 17, 24, and 31) WHAT IS THE PARTY'S RACE/ETHNICITY?

- a) Mark for every party: parents, grandparents and legal guardians.
- b) For the purposes of this report, an individual cannot have two ethnicities. If the participant checked two on the data collection sheet, then on the report mark " TWO OR MORE RACES".

12. (As well as questions 18, 25, and 32) IS THE PARTY RECEIVING TANF FOR A CHILD?

- a) Mark "yes" if the party being entered answered "yes" on their demographic sheet.

13. (As well as questions 19, 26, and 33) DOES THE PARTY HAVE AN OPEN DCSE CASE?

- a) Mark "yes" if the party being entered answered "yes" on their demographic sheet.

14. (As well as questions 20, 27, and 34) DESCRIBE THE PARENT'S RELATIONSHIP WITH THE CHILD(REN)'S OTHER PARENT?

- a) This section in the survey is only shown to parties who are listed as not being grandparent's/legal guardians
- b) This refers to the relationship between the parents of the child about whom the mediation was conducted. This section identifies the MARITAL STATUS of the parents of the child **in relation to each other**.
- c) The data collection form should be clear so that parents will understand the information requested is about the relationship to the other parent of the child, not to the relationship of a current partner. If father and mother note a different relationship status on the form, either one or both misunderstood the question. Select the most appropriate relationship and use for both parents on the A&V report.
- d) Even if the parent marked multiple boxes on the collection form, do not mark multiple answers on the A&V report. A parent is SEPARATED or NEVER MARRIED, not both. Pick one status and use it for both parents.

- e) Mark these columns only for parents. Do not mark this column for grandparent or legal guardian. For this report, the MARITAL STATUS of grandparent or guardian is irrelevant. Some parents may indicate MARRIED rather than SEPARATED. On the A&V report indicate their status as SEPARATED. If they are in JDR court, they are at least preparing to separate with one exception. If the grandparent or legal guardian has sole physical custody at the time of the mediation, then parents might still be married and living together. Allow MARRIED for this scenario only.

15. (Questions 21, 28, and 35): WOULD YOU LIKE TO LOG ANOTHER PARTY FOR THIS MEDIATION?

- a) Select “Yes” if there are additional parties that need to be entered for the case. If yes is selected, the user will be taken to another screen to enter the new party. *4 parties maximum can be entered with this tool. If there are more than 4 parties that fit the criteria for this report, contact Jon Lamp at jlamp@vacourts.gov.*
- b) Select “No” if there are no more additional parties that need to be entered. Users who select “No” will be taken to a case summary screen.

End of the Survey – Summary

- a) The majority of the information entered for the case is displayed. At this point, *the case is not submitted, so the user may go back and change their answers if needed.*
- b) After continuing from this page, the survey will be submitted and is no longer editable.