CaseTrace

Frequently Asked Questions

Accessing CaseTrace

What website should I use to access the new CaseTrace system?

New CaseTrace URL: https://icabglobal.com

Note**: The data available on this site includes records migrated up to **May 10, 2026.

What website should I use for practice and training purposes, and to familiarize myself with the new CaseTrace system?

The website for the testing and training version of CaseTrace is https://prod.iicab.ncsect.org/.

***Note**:* This is the same website that was used for global testing purposes and can continue to be used for training and practice purposes. *The data available on this site includes records migrated up to January 8, 2026*

When will we transition to the new CaseTrace system?

The final transition is scheduled to take place on **May 15, 2026, at 12:00 am UK time**. Both sites will be unavailable between 12:00 am UK time on May 10 and 11:59 pm UK time on May 14.

Can I access the old system (for viewing / information purpose only) after migration to the new site?

Yes; starting May 15, 2026, users will only have view-only access for the old website, which will be accessible on https://old.icabglobal.com.

Note: *Please do not try to add or edit any data in the old system after May 15, 2026*

Have all existing users been migrated with their existing usernames?

Yes. All existing users have been migrated with their existing usernames and will also be able to log in using their existing email address. **This applies to both the new CaseTrace system** https://icabglobal.com and the **testing / training website** https://prod.iicab.ncsect.org/.

Exception: Usernames containing special characters (e.g., *shan_momin)* will be standardized by replacing those characters with a dot (e.g., *shan.momin*). The following characters are affected:

! @ # $ % ^ & * ( ) _ + - = [ ] { } ; : ' " , < > / ? | \ ~ ` and spaces, tabs, newlines, and all non-Latin characters (e.g. é, ñ, emojis).

What access level will each user receive?

Access levels are assigned based on the user's role in the previous system:

- **Mediator**: previous role was Regular Member or Guest
- **National Admin**: previous role was Administrator
- **Chairperson**: either Regional Chair or National Chair, based on their Group

Login & Password

What is the default password for my initial login?

The default password for first-time login is **Password786** – both during the Global Testing and Roll-out.

What steps are required after logging in for the first time?

After logging in with their Username and the default Password (**Password786**), Users will be prompted to set a new password and will thereafter be redirected to their Profile page to:

- Update their Date of Birth.
- Click Save & Next. A confirmation message "**Thank you for updating your details**." will be displayed.
- Click **Return to Home Page**.
- Click **Enter** in the Case Management menu to access CaseTrace.

Note*: Once logging out, Users will only be able to log in using your updated password going forward.*

What is the process for resetting a forgotten password?

Step 1: Initiate Password Reset

- On the Sign In page, click the "**Forgot Password**" option.
- Enter your registered Email Address and Date of Birth, then click **Submit**.

Step 2: Based on the Entered Details

- If the details are correct: password reset instructions will be sent to your registered email. Follow the instructions to regain access.
- If the details are incorrect: you will be asked to complete a verification form with your First Name, Surname, Email Address, Confirm Email Address, Contact Number, and Country, then submit for review.

Step 3: Request Review Process

- The Super Admin will be notified via email that a "*login request is waiting for resolution*."
- Users will receive confirmation that their login details will be emailed within a few days once reviewed by the ICAB Super Admin.

Step 4: Super Admin Review (Internal Process)

- Navigate to the CDS Updates menu and open *Login Details Request CDS*.
- Click the **Match** option against the relevant entry, then click the **Search** (magnifying glass) icon next to the Email field.
- The system will display a green checkmark (✓) for matching fields, or a red × for mismatches (e.g. incorrect Date of Birth).
- If appropriate, click **Send Login Details** to proceed.

Step 5: Reset Password

- The User will receive an email with a link to reset their password.

To reset a user's password directly (National Admins):

- Navigate to User Management > Edit (for the respective user) > Reset Password.
- The user will receive an email with a reset link.

Accessing CaseTrace

Is CaseTrace accessible on mobile devices and tablets?

Users can access a mobile-friendly version of CaseTrace from any mobile device or tablet. No special settings are required. You can schedule meetings and add entries to your preferred calendar from a mobile device, just as you would from the desktop version. ICAB will be working with the developers to design a mobile app.

Who can access and edit a case?

All Mediators assigned to a case may access and edit it, including Co-mediators and assigned Case Managers.

What does "II" stand for?

Ismaili Institutions.

Case Management

Can the local case number be made mandatory, when creating a new case?

The local case number field is not mandatory when creating a new case. Users may enter it manually, if desired.

If Parties have previously used CAB for the same dispute, is there a feature to link both cases together?

No; however, users can manually enter the previous case number and any local case number, if applicable.

Can we enter a Party's information before sending them the online forms?

The Personal Details Form and Agreement to Mediate does not users to add a Party's information before sending them the form, as the link that a Party receives for each respective form is a unique link.

For new cases in multi-tier jurisdictions, is the region based on the applicant or the Mediator?

The Region and Jurisdiction are based on the Applicant's jurisdiction. For example, if the Applicant resides in the Southeast USA region, the case would be associated with RCAB Southeast USA.

Can a case be transferred to another region?

Yes. Cases can be transferred to another jurisdiction or region by the NCAB or RCAB Chair, as well as the National Admin as per the ICAB permission matrix.

Can I have more than one major root cause?

Yes, users can enter as many root causes (individually) as possible and select if each is major or minor.

What does it mean when the root cause is described as being from the perspective of the Applicant, Respondent, or Mediator?

Any Party or Mediator can identify a root cause. For example, if the Respondent believes the cause of the dispute is a certain root cause, the Mediator will indicate that the root cause is from the Respondent's view.

When a document is uploaded, does the system track the name of the Mediator who uploaded it?

Yes. Like the previous system, the new system has an audit trail for each case, including documents added.

For “medium,” can we specify a phone call versus a video call.

For now, phone and video calls are considered virtual.

Is data that is entered saved automatically?

The data entered does not auto-save; however, the session timeout duration is set to 60 minutes.

For Referrals, does CaseTrace help us follow-up with the other service provider for an update?

No, as this feature is not part of the system.

Do we have spell check?

Spell check is provided by the browser.

Do we need to create Actions to document the time it takes to track our cases?

Yes. Creating Actions helps users track time spent on a case.

Is there an option to pause a case and indicate why the pause was implemented and by whom? For example, if the Applicant is travelling for work, or the Respondent has requested a pause to complete counselling, can we pause the case until a party returns from traveling or completes counselling?

At this time, there is no feature to pause cases.

For commercial cases, a mediated settlement amount is easier to enter for Amount of Dispute. How can we enter this information for matrimonial cases, which normally has more complicated financial settlements?

Users can elaborate on any additional financial settlement terms, if necessary, in the case closure summary screen.

Does the new CaseTrace allow freeform search?

Yes. Users can search for a case using multiple criteria, including the current and previous case Number, case type, relevant dates, case status, jurisdiction, group, sub-group, and Case Manager. Additionally, users can also search cases based on data entered for Previous Legal Proceedings, Case Synopsis, selected Nature of Case, and Root Causes within a case.

If a case is closed, and a new case is opened with the same parties and the same dispute, will the Mediators in the new case have access to any information regarding the previously closed case?

Mediators will only have access to the cases that they are assigned to.

Can a Comediator edit information, or does the assigned Case Manager have to edit information?

All Mediators assigned to a case may access and edit that case.

Forms

Are all the form input functions open to Mediators or only to Chairs?

Mediators and Chairs can enter data for any of the online forms.

Can we send the online forms to Parties in a language other than English?

No. The online forms cannot be initially sent in a language other than English. However, once the Party opens the link for entering personal details or accessing the agreement to mediate, they have the option to change the language, and the form will be translated accordingly based on their selection. Additionally, please note that currently not all forms sent via email have been translated. Once the translation of these forms is completed, the above process will work.

Do the shared forms have to be filled at once by the Applicant, or can the Applicant partially complete the form and return to it later?

The shared forms link expires once the required details in the Personal Details Form are saved, so it cannot be resumed later if a Party opens the same link.

Are templates such as Minutes of Settlement available on this CaseTrace?

No. Only the Personal Details Form, Agreement to Mediate, Follow-up Assessment Form, Satisfaction Survey, and Mediator Self-Assessment are available on CaseTrace as online forms. Other CAB forms and relevant policies and procedures can be found in CaseTrace under the Documents menu.

Are we able to send a CAB mediation participation email along with different case scenarios through this application?

No. There is no current option for users to send messages to and from CaseTrace and any external system. This may be part of the next phase of development.

For Monitoring and Evaluation, can users send the surveys via CaseTrace?

Yes. Users can email the Follow-up Assessment and Satisfaction Survey to parties through CaseTrace.

For CAB Ontario, our Personal Details Form is slightly different from the global version in CaseTrace. Can we upload our own form instead?

Users may upload their jurisdiction's modified Personal Details Form when completed by the parties, using the *upload* feature.

Will the Satisfaction Survey be pre-populated with case details?

When a Party receives an online version of the Satisfaction Survey, the Party will only see questions in Parts 2 and 3 of the survey.

Can the Chair or National Admin assign the task of completing the Satisfaction Survey to another user?

The Satisfaction Survey link can be shared with anyone, except for the CAB Member assigned to the same case for which the link was generated, thus allowing the other person to complete the survey.

When a party is sent a link to a Personal Details Form or Satisfaction Survey, does completing the form automatically populate all fields from CaseTrace, or does the Mediator have to manually enter the information?

Information from the Personal Details Form and Agreement to Mediate does not auto-populate with the same fields in the database. However, data from the Follow-up Assessment Form, Satisfaction Survey, and Mediator Self-Assessment Form will auto-populate in the Annual MER (Monitoring and Evaluation Report).

Reports

Can a Mediator see their own reports and the reports of the Mediator's region?

A Mediator can view reports only for their own cases.

Can we extract reports of all three case categories together for all regions?

Yes. If no case category is selected while extracting the report, CaseTrace will export a report for all three case categories.

Can the Detailed Data View Report be exported to Excel in addition to PDF?

An export option that allows data to be downloaded in CSV format based on the applied filters will be added.

Confidentiality and Privacy

In light of confidentiality being the essence of mediations, can the system capture who accessed the system, who edited or copied the data, and can the system be audited?

Yes. Like the previous system, the new system has an audit trail for each case.

If a closed case is reopened with the same Parties, will previous notes be accessible?

No. Mediators will only have access to the cases they are assigned to. Notes from a previously assigned case will not be automatically available to new Mediators for the new case.

Will the name of the Case Manager or Staff Member who entered or edited information be shown?

Yes. Like the previous system, the new system has an audit trail for each case.

Regarding confidentiality, we tell parties that only the Chair and Mediators have access to and knowledge of their mediation case. It is important to clarify if other individuals (e.g., admin) have access.

Only the Mediator and Chair should have knowledge of a case, including the forms and documents. A National Admin member does not have access to case-related forms or documents except for their own cases.

Is information from uploaded documents (such as demographic data, national trends, or household incomes) used for non-CAB related purposes? If so, is there a process for notifying participants so they are fully informed? Do we have a privacy policy we can share?

There is a privacy note and terms of use on the new CaseTrace, a copy of which can be provided to parties, if necessary, once the system is officially rolled out.