



STATE OF MICHIGAN
PROBATE/FAMILY COURT
CASS COUNTY, MICHIGAN

SUSAN L. DOBRICH
CHIEF JUDGE
PROBATE/FAMILY COURT JUDGE

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MEMO

TO: Attorneys Practicing in Cass County, Michigan

FROM: Susan L. Dobrich, Chief Judge
Carol Montavon Bealor, Court Administrator

RE: Imaging

Date: May 1, 2018

Background

As many of you already know, Cass County went “live” with an Electronic Document Imaging (“Imaging”) system some time ago for our family cases, cases with case numbers ending in DM, DO, DP, DS, DC, and DZ. The first phase of the Imaging project focused on family cases and is administered by the Friend of the Court.

Our Imaging system is called OnBase and was implemented for us and supported by the company Imagesoft. Imagesoft is the company chosen by the Supreme Court to implement the statewide “E-Filing” project. So this is good news for Cass County since we are now positioned to seamlessly integrate our Imaging system with the statewide “E-Filing” project, which is tentatively scheduled to occur for our county sometime in late 2019 or 2020. As we learn more about the “E-Filing” project, we will share details with you on that project.

Our Court staffs have been busy fully implementing Imaging for our family caseload in OnBase. There has also been substantial training and learning with OnBase so that we can all fully utilize Imaging’s functionality. It has definitely taken some time for everyone to be comfortable with this new technology. Imaging has been really well received internally and we are now in a good place and eager to share details about the Imaging project with the attorneys practicing in family cases. There has been a learning curve. We are sure this will be good news for the practitioners and good for everyone including the Courts, the practitioners and the public.

The current Imaging project manager is Sarah Mathews, who is also our Deputy Friend of the Court. Sarah coordinates our OnBase system in conjunction with the IT Department with IT Director Kerry Collins and the Clerk’s office with the Clerk File Room Supervisor Emily Bogue.

What the Imaging Project actually does

<u>IMAGING</u>	<u>WORKFLOW</u>
Taking a “picture” of a document and storing it on the computer	Moving the imaged document from user to user to accomplish a task
<p>For example, the Clerk receives a proposed Order from an attorney</p> <p>The Order is scanned into OnBase by the Clerk</p>	<p>The Order then enters workflow</p> <ol style="list-style-type: none"> (1) Stop 1—Clerk processing Queue where the Clerk ensures the document is ready to be routed (2) Stop 2—FOC review Queue so that the FOC can review and approve the proposed Order and sign off on it electronically in OnBase (3) Stop 3—Judicial review Queue so that the Judge can review and sign off on or deny the proposed Order in OnBase (4) Stop 4—Judicial staff processing Queue so the Judge’s staff can enter the action taken by the Judge in the Court’s case management system, JIS (5) Stop 5—Clerk processing Queue for the Clerk to apply the file stamp electronically and ensure that an entry is made in JIS about that filing (6) Stop 6—the document is virtually sent to the “Court File” in OnBase

<u>Before Imaging</u>	<u>After Imaging</u>
<ul style="list-style-type: none"> • Physical files were susceptible to damage • We had storage limitations for the files • There was limited file tracking (files could be in a number of locations at any time [with Judges, with FOC, etc]) • We had inefficient document transfer (walking files back and forth) 	<ul style="list-style-type: none"> • Digital data back up in triplicate • Virtually unlimited storage • All documents are readily accessible • Documents transferred in seconds • Documents are tracked • All users who touch a document are recorded and become part of the document history

What Imaging means for the attorneys

- **NO MORE BLUE “FAMILY FILES” IN THE CLERK’S OFFICE**
 - For all family files, 2018 and later, there is no longer a blue Court file— Instead, the Court file is housed in our OnBase Imaging system
 - The Clerk’s office is also bringing pre-2018 files into the OnBase Imaging system as motions are filed in the older cases and as time permits

- **NO MORE FOC FILES IN THE FOC**
 - For all FOC files, 2018 and later, there is no longer a paper FOC file
 - The FOC is also bringing pre-2018 cases into the OnBase system as motions are filed in the older cases and as time permits

- **YOU CAN VIEW “COURT FILES” VIA THE “PUBLIC ACCESS TERMINAL”**
 - The Public Access Terminal is located in what used to be a conference room adjacent to the left of the entrance into Circuit Court
 - There are instructions at the Public Access Terminal as to how to access cases in OnBase and search for documents you need to view
 - There is a printing request form which you can use to request printed copies of the documents in OnBase from the Clerk

- **TO VIEW THE FOC FILE**
 - You will still need to request access to the FOC file by completing FOC 72 “Request to Access Friend of the Court Records and Decision”
 - Then, if access is granted, you can either view the records in the FOC office on one of our computers or you can receive printed copies of the FOC documents subject to disclosure

- **REFEREES AND JUDGES WILL VIEW “COURT FILES” VIA ONBASE**
 - You may have already seen Referee Melissa Sytsma reviewing Court files in OnBase during Referee hearings
 - You may also have seen Judge Dobrich and Judge Herman accessing Court files in OnBase during Court hearings

- **ATTORNEYS NO LONGER NEED TO FILE MULTIPLE COPIES OF PLEADINGS**
 - Only one copy of each pleading is needed by the Clerk
 - No FOC copy of documents is needed—the documents needed by the FOC are routed through OnBase to the FOC

- **IF YOU PLAN TO BRING AN ORDER WITH YOU TO A HEARING, WE'D LIKE TO GET IT UPLOADED INTO ONBASE BEFORE COURT IF POSSIBLE**
 - You can email those proposed Orders to Carol Bealor at carolb@cassco.org or Melissa Sytsma at melissas@cassco.org
 - You can bring a hard copy of the Order to Carol Bealor or Melissa Sytsma at the Law & Courts building prior to a hearing
 - You can bench file the Order at the hearing; however, it will then have to be sent to someone to scan it into the OnBase system

- **DOCUMENTS THAT CONTAIN MULTIPLE HEADINGS**
 - SCAO is in the process of reviewing forms to eliminate documents such as a combined Motion, Notice of Hearing and Certificate of Service or Stipulation and Order and the like since these types of combined documents are problematic for Courts using Imaging
 - Each document is scanned in with one name
 - Different documents have different work flow routes—for example a motion may be routed to 3 people and then a Notice of Hearing may be routed to 3 different people—so combined documents have to be scanned in multiple times and then re-named each time making extra work for the Courts
 - When possible, we are asking attorneys to keep each type of pleading as a separate document instead of creating combination documents
 - For example, please create:
 - Separate stipulation document & a separate Order document
 - Separate motion document & a separate notice of hearing document and a separate certificate of service document, etc.

- **EXHIBITS**
 - We cannot accept Exhibits attached to motions in the same manner as occurred prior to Imaging
 - Please handle Exhibits as follows:
 - When possible, exchange Exhibits with opposing counsel or the opposing pro per party instead of attaching them to motions
 - If Exhibits to motions are needed, please note:
 - The Court cannot accept Exhibits separated by dividers—instead, please separate different Exhibits by separate sheets of paper marked, “Exhibit 1” or “Exhibit A” etc.
 - The Court cannot accept color photos as Exhibits
 - The Court cannot accept DVD's or CD's as Exhibits

Future coming attractions, which may be of interest to the attorneys

- **AN ONLINE “PUBLIC ACCESS” TO COURT FILES**
 - We are working with Imagesoft to get your public access website functional so that attorneys can then have access to the Court files from the web
 - There will be most likely be an annual fee paid by attorneys who can access so that they can then have unlimited access to our OnBase system which would then allow attorneys to download and print documents from the web
 - Otherwise, there will be a per document download and printing fee which is still in development

- **CASS COUNTY PLANS TO EXPAND IMAGING TO THE OTHER COURTS**
 - The tentative order for expansion is:
 - Circuit Civil
 - Circuit Criminal
 - Other Courts (order not yet determined)
 - Probate
 - District
 - Juvenile
 - Family—abuse/neglect

- **E-FILING**
 - On May 1, 2017, the State signed a contract with Imagesoft to provide a single e-filing platform that supports all trial courts (Circuit, District & Probate) and can integrate with Courts’ existing document management and case management systems.
 - The tentative time-line for the rollout of this project is as follows:
 - 2018: Pilot courts will implement e-filing
 - 2019-2021: Statewide expansion of e-filing
 - More details on the E-Filing rollout strategy can be found at:
<http://courts.mi.gov/Administration/admin/Pages/e-FilingRolloutStrategy.aspx>

Conclusion

I hope this memo answers some of the attorneys’ questions about Cass County’s Imaging project. Feel free to reach out to Sarah Mathews by telephone at 269-445-4436 or by email at sarahm@cassco.org if you have any additional questions after reading this memo.