

Start Scanning Guide

Please find a list of recommendations for the court to consider in preparing for the start of scanning documents.

2 Months before

- Review document scanning process recommendations in Gold. See Gold > Document Management System – DMS> DMS – Scanning Process
- Contact the Office of State Courts Administrators Help Desk at osca.help.desk@courts.mo.gov to request your court begin scanning and using JIS document management system (DMS).
- Provide a list of users that will need access to DMS and the level of access needed for each user (view, edit or supervisor). (Currently under construction).
- Purchase scanner(s) if not available. Refer to the Missouri Court Automation [Infrastructure Standards](#) for equipment recommendations.
- Review [Court Operating Rule 2](#) and [Court Operating Rule 8](#) for record retention and public access rules.
- Determine what to start scanning and start date for electronic record. (Currently under construction).
 - Review procedures for using file location code E-CASE and docket code FSCAN. (see MCIC > Justice Information System (JIS) > JIS Deployments > Deployment Documents – 12/2011)
 - Review cases and documents for proper docket codes, case level security and document level security
 - Review the document security recommendations and impact for Case.net provided by the Office of State Courts Administrator.
 - Begin associating motions and orders (if not already doing this) See Gold> Docketing> Docket Association Entry (CDADOCT) > CDADOCT Information Association Block > Docket Associations.
 - Determine where to start? Select case types, specific judge(s), divisions, etc.
- Review DMS and the CZRLMRG process and DMS and the Scanner Process scanning demonstrations in [Jewels](#).
 - [DMS and the CZRLMRG Process](#): This 13-minute demo will show you the process of linking documents that were merged in CZRLMRG to the Document Management System (DMS) in JIS without printing or scanning.
 - [DMS and the Scanner Process](#): This 25-minute video discusses scanner basics, quality control and demonstrates two scanning processes. The first process demonstrates how to scan a document using the DMS when you are already working on the case in JIS. The second process demonstrates how to scan documents and then link them to the DMS in JIS.

1 Month before

- Create a training plan for the clerks and have staff begin training.

3 Weeks before

- Install scanners.
- Review DMS and the CZRLMRG process and DMS and the Scanner Process scanning demonstrations in [Jewels](#).
 - [DMS and the CZRLMRG Process](#): This 13-minute demo will show you the process of linking documents that were merged in CZRLMRG to the DMS in JIS without printing or scanning.
 - [DMS and the Scanner Process](#): This 25-minute video discusses scanner basics, quality control and demonstrates two scanning processes. The first process demonstrates how to

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scan a document using the DMS when you are already working on the case in JIS. The second process demonstrates how to scan documents and then link them to the DMS in JIS.

- Refine court processes as needed.

2 Weeks before

- Determine court processing to include scanning steps.
- Identify courts scanning quality assurance process. Recommendations can be found in Gold. (Currently under construction).
- Train staff on the courts quality assurance process.
- Train staff on the document security recommendations and impacts for Case.net. Document security recommendations can be found in Gold. (Currently under construction).
- Have staff practice scanning cases and working through court processes.
- Refine court processes as needed.

1 Week before

- Refine court processes as needed.

Day of

- Start scanning following court's scanning policy.

2 weeks after

- Review court processing scanning steps for any refinement.
- Review scanning quality assurance process. Recommendations can be found in Gold. (Currently under construction).
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Available Assistance

Assistance will be available by contacting the OSCA Help Desk at osca.help.desk@courts.mo.gov or by calling them at 888-541-4894.

Training Opportunities for the Start of Scanning

For training opportunities for electronic filing, go to [Jewels](#).

[DMS and the CZRLMRG Process](#): This 13-minute demo will show you the process of linking documents that were merged in CZRLMRG to the DMS in JIS without printing or scanning.

[DMS and the Scanner Process](#): This 25-minute video discusses scanner basics, quality control and demonstrates two scanning processes. The first process demonstrates how to scan a document using the DMS when you are already working on the case in JIS. The second process demonstrates how to scan documents and then link them to the DMS in JIS.