

Court Case Study: Calhoun County, MI

“Our staff was initially a little reluctant to accept the need to change the case flow processes they were familiar with, but after training and getting comfortable with the new system, staff morale improved as well as our efficiency in managing court documents.”

— **Kris Getting**
Circuit-Probate Court Administrator,
Calhoun County Courts

The Customer

Calhoun County, Michigan, located between Detroit and Chicago at the junction of I-94 AND I-69 (two major highways), consists of 709 square miles. In 2010, it had a population of 136,025, among the county's three population areas: Albion, Marshall and the largest, Battle Creek.

The Challenge

Like most court systems, Calhoun County courts was struggling to meet demands for storing, filing and accessing court documents. It was a challenge to locate documents and simple editing and approval processes took days. Only one person at a time could review and edit documents and case files.

Of the more than 150 people employed by the Circuit Court, Probate Court and District Court, three full-time employees were tasked with filing and refiling paper court documents. Even with those dedicated resources, paper documents were occasionally mislabeled or lost. It was common to hear someone pose a general query over the PA system asking for help in locating important court documents.

The imaging system in use by the Circuit Court had no workflow function and was not searchable. The Probate and District Courts did not use any imaging. The entire process was dependent on paper, prone to misfiling and frustration was frequently the result over the inability to quickly locate and access documents.

The existing storage space was filled with court documents and the external storage site was expensive to maintain and inconvenient to access. The necessity to either find additional storage space or change the documentation process was evident. A major challenge was customizing the case flow and document access processes. Each Court functions quite differently and Calhoun County Courts had unique requirements for a specially designed electronic document management system.

The Solution

The county administrator realized that business as usual would not lead to a well-functioning court or county system. She wanted to implement a county-wide imaging system that would capture paper documents into a digital format, accessible by all stakeholders within the system with proper authority.

The move to OnBase® by Hyland, an enterprise content management and process management software suite, started with Friend of the Court and the Office of the Prosecuting Attorney. OnBase centralizes court documents in a secure location and uses its sophisticated workflow technology to deliver relevant information whenever and wherever needed.

Eventually the District Court, Probate Court, and Circuit Court moved into a digital, paperless solution. Three courts were launched at the same time in an aggressive, six-week window. Workflow processes were assessed and renovated to maximize the new electronic system. The benefits of multi-point access and improved workflow times were quickly apparent.

All the courts leverage the same technology solution, but documents are segregated by court. Security parameters ensure that only authorized staff members can

retrieve and modify court documents.

Documents that, at one time, were only available to a single person could now be easily found and shared, if appropriate. Clerks and assistants no longer needed to find who possessed a file to respond to status inquiries and all the notes were kept centrally in one location, securely accessible by those who needed to view them.

Calhoun County intended to run the old paper-based system concurrently with the new digitized OnBase solution for one year. This ensured that any mishaps during the deployment and familiarization phase could be recovered using the legacy system. They stopped using the paper-based system after six months, deciding the duplicative work was unnecessary.

ImageSoft provided the expertise to revise the court's case flow based on each individual court's unique needs. There are many different ways to input and access documents, and the courts had to create automated workflows to satisfy the requirements of each entity. Since OnBase is highly configurable, the Court has worked with ImageSoft to continually refine the system, deploying new applications in various departments on the Court's schedule.

Confidence in the new solution is soaring!

The Results

Calhoun County courts are well positioned to leverage eFiling when they join the State of Michigan eFiling initiative, MiFile, expected in 2019. Multiple parties can now access the same document at the same time. Judges, court staff, probation officers and, when appropriate, the public can all review important legal documents.

The file clerk jobs were phased out and they were converted to other higher value roles. Overtime hours were greatly reduced as the need to search for missing files and the legwork of transferring files was eliminated. An ancillary result was that offices were neater and less cluttered.

There was always the fear that misfiling a document under the old system would result in a lost document, difficult and time consuming to find and correct. The OnBase solution made it easy to correct files if they were improperly indexed. The customized AutoFill Keyword Set feature (which uses data from the case management system to index documents) significantly reduced time spent on labeling with fewer data entry errors.

Although the transition to a new system did require extensive training and updating of some work processes, the morale of staff has improved and complaints about the system have dropped to a refreshingly manageable level.

The four District Courts – each of which could receive up to 80 cases in a morning – are now able to meet that demanding pace. Judicial secretaries have become adept at preparing the electronic files, allowing judges to work through their dockets quickly and maintaining an electronic record for each proceeding.

Attorneys and local media can access documents and review court filings, a public module will eventually enable citizens to retrieve documents remotely, and the court administrators and other managers can review work queues, identify troublesome bottlenecks and take any necessary corrective action. Reports are much more useful, as system queries quickly provide data and results in informed, actionable decision making.

The biggest benefit identified by court staff is the ability to locate documents in real time, regardless of who is interacting with the file.

Calhoun County, MI

The Challenges

- Office space was being overcrowded by filing cabinets and unorganized paper documents
- Jobs were being consumed solely by paper filing and locating documents
- Because a workflow was not in place, searching for and finding documents was frustrating and time-consuming
- A document or file could not be viewed by more than one person at a time, which caused a significant bottleneck in filing cases

The Results

- A completely electronic document management system eliminated the need for physical file cabinets or expensive off-site storage
- Staff were able to focus on more significant roles and add to the efficiency of case processing
- With the electronic workflow, locating, editing, or re-indexing a document was as easy as a few clicks.
- With proper viewing credentials, all necessary parties can simultaneously access and work on a case