



**Quality Division Use Only**

Quality Tracking # 2022-PAR12 Date Quality Division Notified: 10/5/2022

Division: Client Services & Case Management Division Section: Client Services & Case Management

Identified Through: Daily Operations

If other, state source: \_\_\_\_\_

**Description of Original Process:**  
 When compiling a discovery order, a CS/CM admin specialist follows a specific process that involves compiling case records in a specific folder structure and using specific naming schemes as described in the SOP. Each document is downloaded from LIMS, saved, and renamed.

**Description of Improved Process:**  
 The Case Packet tab in JusticeTrax is a feature that allows a user to compile multiple documents from different locations (within the same case) and combine all of those documents into one PDF document. This process is fairly simple and allows the user to choose which documents to pull and also gives the user the option to organize the files before the final PDF is rendered. In this new process, one combined document will take the place of previously individualized and specifically named documents. Using this feature allows for faster compilation and turnaround time, reduces the manual download of documents, and minimizes transcription errors. The SOP was revised, and this process was made effective on September 1, 2022.

Staff Member: Callan Hundl

Date: 10/6/2022

Immediate Supervisor: Marissa Noel, Jeffrey Frye

Date: 10/7/2022

Division Director: Amy Castillo

Date: 10/12/2022

Quality Director: Erika Ziemak

Date Closed: 10/17/2022