

“FileTrail has improved records management in the Court of Appeals in a variety of different ways. Staff can now checkout and return files without the need to complete outcards, which saves time and effort.”

Court Administrator
Court of Appeals

State Court of Appeals

Appellate Courts Division gains control of legal files with FileTrail.

Client Profile

Headquarters: Seattle, WA

Industry: Justice

The State Court of Appeals of one Western state hears civil, criminal, PRP cases, and conducts discretionary reviews. The court consists of 10 judges, 4 commissioners, 6 staff attorneys, plus administrative and support staff and handles about 2,000 active cases at any one time. The court implemented FileTrail to track and manage case files and exhibits in June of 2005.

FileTrail Implementation: 2005

FileTrail Products Implemented

- **FileTrail Professional** - Complete file tracking and records management automation.
- **FTMobile™** - The software allows files to be checked-in, checked-out, transferred and boxed without being tethered to a workstation.
- **FTSynchronize™** - Loads and updates data from upstream resources to keep FileTrail data synchronized and up-to-date with authoritative systems.
- **FTColorLabel** - On-demand printing of color-coded folder labels.

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<http://www.FileTrail.com>

Background

Prior to 2005, the Appellate Courts Division of a Western state struggled with a manual filing system. As their caseload grew, the time and labor involved in handling these files and exhibits seemed to grow even faster. The staff felt that there must be a better, less time-consuming way to get the work done.

Locating files and exhibits was very labor-intensive and other filing tasks consumed valuable staff time as well. Case files were labeled with individual sticky tabs that were applied by hand. An outcard process was used to check out files. Also, descriptions of exhibits were kept manually in a spreadsheet.

The court selected FileTrail after reviewing formal presentations on a variety of solutions. FileTrail was selected primarily because of its labor-saving processes, ability to synchronize with any case management system, and their experience in the court environment that was evident in the software itself.

Eliminating Searches for Case Files

The court has virtually eliminated the physical searches for case files that used to consume staff time. Today, all staff have access to a search and locate tool from their desk using FileTrail. If a file is needed, it can easily be selected from the search results and requested. The browser-based software is easy to use and requires almost no training.

All of this happens because FileTrail has made it so easy to track case files. Simple processes update the current location and build the chain-of-custody history. To check out files, file room staff simply scan a bar code representing a person, the bar codes of all the case files going to that person, then a "check-out" bar code.

The check-in process is even simpler. Staff scan the bar codes on case files and then scan a "check-in" bar code. Fulfilling requests - including pulling for the court calendar and pulling requested files - is a one-click process that does not even require scanning the bar codes.

“FileTrail has improved records management in the Court of Appeals in a variety of different ways. Staff can now checkout and return files without the need to complete outcards, which saves time and effort,” said the court administrator.

Application Highlights

- FileTrail is synchronized with the case management system to automatically load new case data and trigger printing of color coded labels.
- FileTrail is synchronized with the court calendar to automate retrieval processes with the pull list and delivery list reports.

Key Results

- **Saves Labor:** FileTrail saves labor by eliminating lost files, automating file labeling and organizing case files and exhibits.
- **Better Access:** FileTrail eliminates the “walking payroll” by providing the ability to locate files and exhibits to staff at their desks.
- **Promotes Compliance:** FileTrail keeps audit trails and controls access to critical records, increasing staff accountability.
- **Prevents Duplication:** FileTrail prevents duplication of files by making it easy to see what already exists and issuing a warning if users try to create a duplicate.

Customer Insight

The flexibility was a great surprise. We have screens and labels with the exact information we use to describe files and exhibits. Box and file information was quickly configured to work on our pre-printed labels. Best of all, when we need changes, the tools are built in to add new fields or rearrange screens without waiting for someone else to make the changes.

Performance was critical for our court. Other software didn't have the court-specific features that would really save us time. In addition, FileTrail was really easy to understand and it loads data from our case management system. Those are important capabilities if you want the court staff to use it and to save time.

About FileTrail

FileTrail, Inc., is the leading provider of browser-based records management solutions. Companies of all sizes turn to FileTrail to streamline processes with the latest technology and most configurable software. Headquartered in San Jose, California, FileTrail has been providing solutions for records management since 2001.

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Integrating Systems

FileTrail streamlines the process of creating new case files. New case data is imported every day from the court's case management system, eliminating the need for data entry and triggering production of color-coded folder labels.

FileTrail streamlines pulling files for the calendar when docket data can be imported. The pull list report supports an efficient process of gathering all the files in a single pass through the file room while alerting you to the location of files that are checked out or archived.

“FileTrail helps us identify who has each file and the entire history as well,” said one clerk. “The easy search tools and bar code tracking save time by eliminating manual searches for files.”

Conducting Audits

One of the labor-saving tools FileTrail provides is the Mini. The Mini is a palm-sized portable bar code scanner that automates auditing and archiving. Audits produce an audit discrepancy report alerting you to missing and unexpected items.

Managing Exhibits

The court uses FileTrail to automate control of exhibits, in addition to case files. The exhibits are logged into the searchable FileTrail database, and the bar coding and tracking tools help manage them. Saving labor is a natural result of implementing these controls.

“FileTrail gives us quick access to determine whether a case has exhibits, what type they are, how many there are, and where to find them,” said a clerk.

Automating Labeling

Prior to implementing FileTrail, labeling was a manual process. Case files were color-coded by hand-wrapping individual sticky tabs along the end tab. A typewriter was used to complete the case file with text information, including case number and name. In addition, labels for the boxes that were sent to the archives each year were created using a typewriter.

FileTrail automates labeling, saving labor and eliminating the need to use a typewriter. FileTrail prints a single strip label for case files containing color-coding, text, and a bar code. This process reduces the labor to setup a new case file by up to 60%. In addition, FileTrail automates printing of the box label using the list of files actually placed in the box.

Leveraging Web Technology

The court benefits from the fact that FileTrail is completely browser-based. FileTrail runs on a server and is accessible to all staff throughout the Court without installing software at each individual PC. In addition, everyone is familiar with the look and feel of the internet.

“FileTrail is so easy that it was easy to get court staff to use it,” said a clerk. “The software is easy for anyone who has used the internet at home.”

Contact FileTrail Today!

For more information about the benefits of automating with FileTrail, call your local FileTrail representative at:

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