



PROTOCOL: How to Process Pre-Disposition Discovery (AKA Through-Disposition) on OCR

Pre-Dispo (AKA Through-Dispo) Discovery is current, automatic and continuous discovery provided to attorneys of record by the case carrying social worker from detention through the court's final disposition of the case. Primary Social Workers are responsible for processing all Pre-Dispo, aka Through-Dispo Discovery, for their cases.

Please refer to [Memo Pre-Disposition Discovery Using Online Court Report System \(OCR\)](#) for further details on the effective date for carrying out Pre-Dispo Discovery on OCR. This Protocol is used specifically to ensure the discovery is prepared, redacted and provided to clerical in a timely manner.

DEFINITIONS

Discovery- The compulsory disclosure, by a party to an action, of relevant documents referred to by the other party. Examples of discovery; delivered service logs (contact notes), police reports, treatment reports, facility/placement reports, school attendance, medical records, etc...

Pre-Disposition Discovery- (aka Thru-Disposition Discovery) Current, automatic and continuous discovery provided to attorneys by the case carrying social worker from detention through the court's final disposition of the case.

Note: Any discovery after the Dispo hearing is requested via the Discovery Unit.

Redaction- Process of removing sensitive and/or personal identifiable information from documentation prior to dissemination.

PROCEDURE

DETENTION HEARING

PRIMARY SOCIAL WORER:

STEP 1 Gather all discovery on an interval basis (eg. daily, weekly) from the case file and/or electronic documents sent to you, make a copy/scan of those documents, upload/download to computer, and begin the redaction process;

IMPORTANT- Reference [Protocol: Discovery](#) to understand what is and is not discoverable as well as what does and does not need to be redacted.

Note: Do not use black marker when redacting manually. Instead, either use a software created redacting tool and black out needed redactions on electronic copies or use white-out rolling tape on hard copies. Check with your clerk for needed rolling tape. Social Workers also have Adobe Reader DC and Microsoft Word installed on their computers that can be used to redact electronic files that are in a Word or PDF format.

For further details please reference, [How to Video: Using Adobe Reader To Redact](#) or [How to Video: Using Microsoft Word to Redact](#)

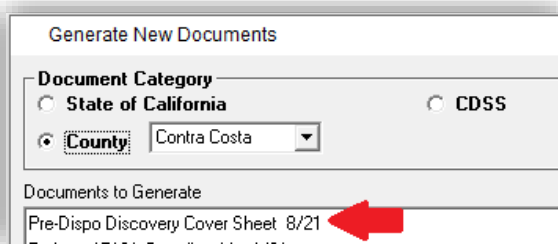
Important, make sure the documents you are redacting are copies and not originals.

Additionally, DOIT has installed a version of Adobe Reader called, **Adobe Acrobat Pro DC** on all case carrying workers main computers who are in the ER and Dependency Investigation/Court programs. This software enables staff to perform electronic redactions on documents. If you do not see this software on your computer or are having difficulty enabling the redaction tool on your version please contact the help desk at (925) 521-7200.

STEP 2

Provide redacted discovery to clerical lead separate from the detention packet by **3pm** the day before the hearing via; a hand-delivered hard copy, [secure email](#), or using the recommended platform, Microsoft Teams, so clerical has the documents to be uploaded to the Online Court Report system (OCR);

Note: When using Microsoft Teams please upload the files to your district clerical Teams channel (i.e. Central District clerical will be named as such in Teams-EHSD *Central Operations Clerical Channel*). If you do not see your district's clerical Teams channel contact your lead clerk to be added.



Furthermore, make sure there is a cover sheet added to your discovery documents when using Teams.

The cover sheet is located on CWS under County Documents

(green button) and is called '**Pre- Dispo Discovery Cover Sheet.**'

Lastly, when using Teams to upload and provide to clerical make sure to name the detention discovery documents with the naming convention;

[Discovery[space]J#[space]date of hearing]

eg. **Discovery J21-11111 05-27-21**

For instructions on how to file share using Teams see the: [Quick Guide on How to Use Teams for File Transfer](#) or the [How to Video: File Sharing on Teams](#).

UNIT CLERK/LEAD:

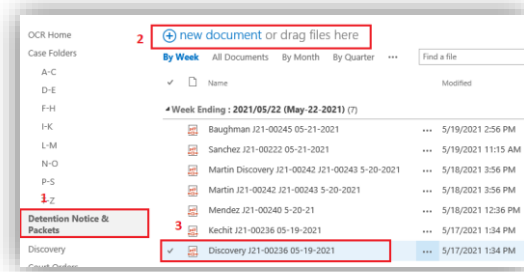
STEP 1 Scan/upload if provided with hard copy of discovery or download from Teams, if shared via Teams, the discovery, separately, from detention packet to your computer. Make sure to name the discovery documents as a separate document with the naming convention, if not done so already;

[Discovery[space]J#[space]date of hearing]

eg. **Discovery J21-11111 05-27-21**

Note: If more than one child add 'et al' after date of hearing. Documents larger than 100 pages please upload as separate documents naming them sequentially (eg. **Discovery J21-11111 05-27-21 et al pt 2**)

STEP 2 Upload discovery document(s) to OCR using the **Detention Notice & Packets** folder. You can upload from your computer or drag and drop document(s). After it is uploaded it will appear in the folder on OCR. CCJA will receive notification via an automatic email.



PROCEDURE

JURISDICTION, DISPOSITION HEARINGS

(Includes related contests, De Novo's & pre-trial matters)

PRIMARY SOCIAL WORER:

STEP 1

After detention of child(ren) and in preparation of the jurisdiction and/or disposition hearing (including contests, De Novo's, pre-trial hearings) gather all discovery on an interval basis (eg. daily, weekly) from the case file, make a copy/scan of those documents, scan & upload or if electronic already download to your computer saving to a convenient folder, and begin the redaction process;

Note: Do not use black marker when redacting manually. Instead, either use a software created redacting tool and black out needed redactions on electronic copies or use white-out rolling tape on hard copies. Check with your clerk for needed rolling tape. Social Workers also have Adobe Reader DC and Microsoft Word installed on their computers that can be used to redact electronic files that are in a Word or PDF format.

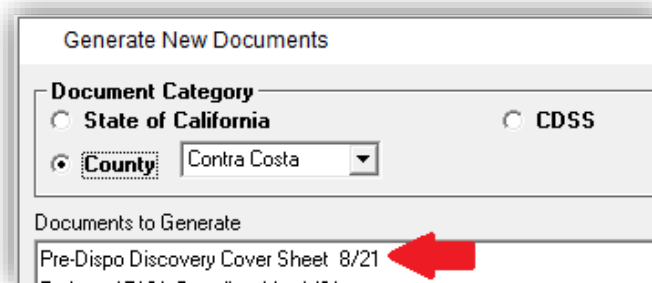
For further details please reference, [How to Video: Using Adobe Reader To Redact](#) or [How to Video: Using Microsoft Word to Redact](#)

Important, make sure the documents you are redacting are copies and not originals.

Additionally, DOIT has installed a version of Adobe Reader called, **Adobe Acrobat Pro DC** on all case carrying workers main computers who are in the ER and Dependency Investigation/Court programs. This software enables staff to perform electronic redactions on documents. If you do not see this software on your computer or are having difficulty enabling the redaction tool on your version please contact the help desk at (925) 521-7200.

STEP 2

Complete the **Pre-Discovery Cover Sheet** (cover sheet is in CWS in 'County documents'- green button;)



Generate New Documents

Document Category

State of California CDSS

County: Contra Costa

Documents to Generate

Pre-Dispo Discovery Cover Sheet 8/21

STEP 3

Provide redacted discovery with cover sheet as page 1 to unit clerk/lead for upload to OCR using Teams file upload District Clerical Channel (i.e. Central District clerical will be named as such in Teams-

EHSD *Central Operations Clerical Channel*). Make sure to name the documents with the naming convention-

[J#[space]type of hearing[space]date of hearing]

eg. **J21-11111 Dispo 05-27-21**

(Reference [Quick Guide on How to Use Teams for File Transfer](#) or the [How to Video: File Sharing on Teams](#))

UNIT CLERK/LEAD:

STEP 1 Check Teams District Clerical Channel for uploaded Pre-Dispo Discovery;

STEP 2 Ensure the packet was uploaded correctly (i.e. cover sheet completed, files attached with correct title) by opening the file. If there are issues with the required documents, contact the Social Worker with needed amendments;

STEP 3 Upload all provided Pre-Dispo Discovery to computer desktop and check to ensure the document is titled correctly with the approved naming convention;

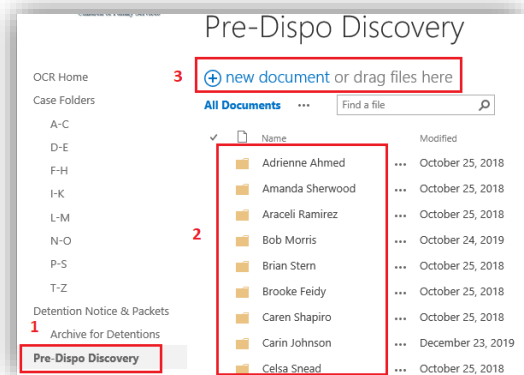
Note: Please rename any documents that are not named according to the approved naming convention.

[J#[space]type of hearing[space]date of hearing]

eg. **J21-11111 Dispo 05-27-21**

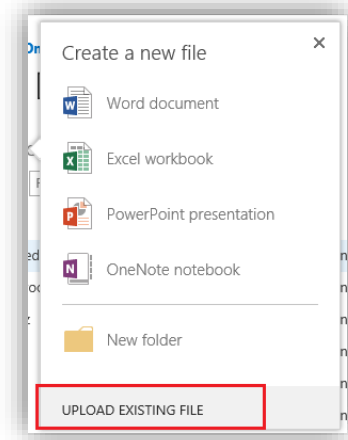
STEP 4 Open OCR on web browser and select '**Pre-Dispo Discovery**' folder;

STEP 5 Find the parties of record using first and last name of attorney (check the Pre-Dispo Discovery Cover Sheet provided by SW);



STEP 6 Select, **+ new document**, then select **'Upload Existing File;'**

STEP 7 Choose file from the window and go to desktop' to locate the Pre-Dispo Discovery packet. (Repeat for each attorney of record, **make sure to add to the County Counsel folder.**)



RESOURCES

[Protocol: Discovery](#)

[Pre-Disposition Discovery Cover Sheet](#)

[Quick Guide on How to Use Teams for File Transfer](#)

[How to Video: Using Adobe Reader To Redact](#)

[How to Video: Using Microsoft Word To Redact](#)

[How to Video: File Sharing on Teams](#)

[Secure Email](#)