

# Procedure for Filing Cases Inactive

Developed by Catholic Charities of Dallas-Immigration and Legal Services

Step:	1	2	3
Who:	<ul style="list-style-type: none"> <li>Program Manager</li> <li>Case Manager</li> <li>Immigration Assistant</li> <li>Staff Attorney</li> </ul>	Immigration Assistant	Administrative Assistant
What Action:	<ul style="list-style-type: none"> <li>_____ Enter a casenote</li> <li>_____ Identify outcome category</li> <li>_____ Place file in File Inactive Rack</li> </ul>	<ul style="list-style-type: none"> <li>_____ Prepare file w/Inactive Cklist</li> <li>_____ Remove staples from file</li> <li>_____ Place left side contents on top of right side contents</li> <li>_____ Enter last 3 "Activities"</li> <li>_____ On the Financial/Misc tab enter "Total Time", "Total Fees", and "Outcome Categ"</li> <li>_____ Scan entire file as one PDF</li> <li>_____ Name PDF with Case No.</li> <li>_____ Save PDF in Inactives folder</li> <li>_____ Pass case to AA</li> </ul>	<ul style="list-style-type: none"> <li>_____ TR of all actions in 1 &amp; 2</li> <li>_____ Open PDF to check</li> <li>_____ Upload PDF in OnDocs</li> <li>_____ Open PDF again to check</li> <li>_____ Delete PDF from Folder</li> <li>_____ Place file contents in shredder</li> </ul>
When:	Immediately (same day)	Within 48 hrs.	Within 48 hrs.
Date:	_____	_____	_____
Initials:	_____	_____	_____

