



LONE STAR

JUSTICE ALLIANCE

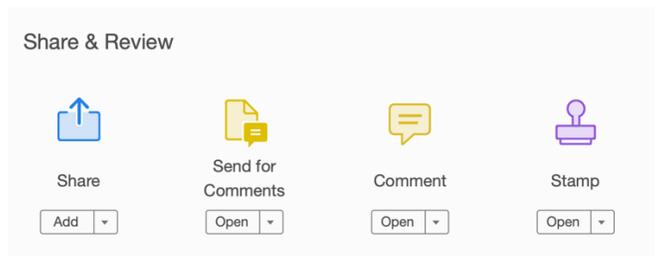
BATES STAMPING DOCUMENTS TUTORIAL

Step 1: Scan documents in as they were received

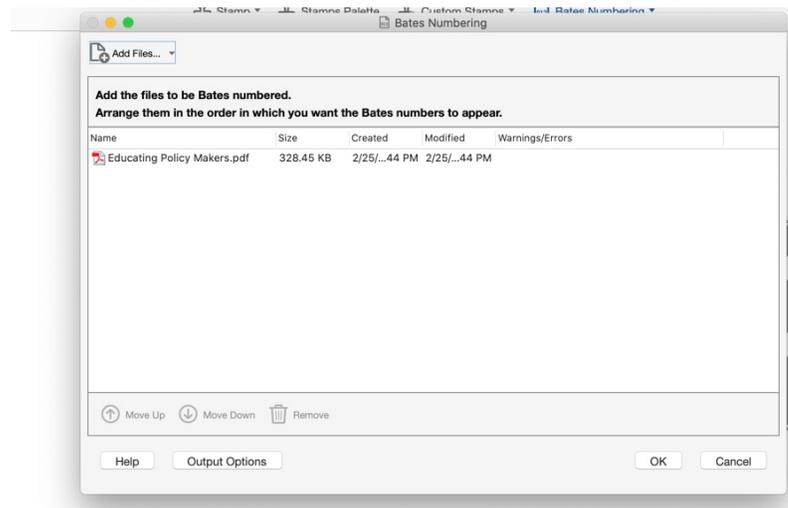
When a records request has been fulfilled, documents need to be scanned and put into teams exactly as they were received from the agency that records were requested from.

Step 2: Download, Bates Stamp, and OCR documents.

- Download the document from Teams and open it in Adobe Acrobat Pro.*
- Use the “Stamp” function in Adobe Acrobat Pro to add bates stamp numbers. The bates stamp function can be found in “Tools” on Acrobat Pro. Add the stamp tool, and click on it in the side ribbon of the document you would like to bates stamp.*

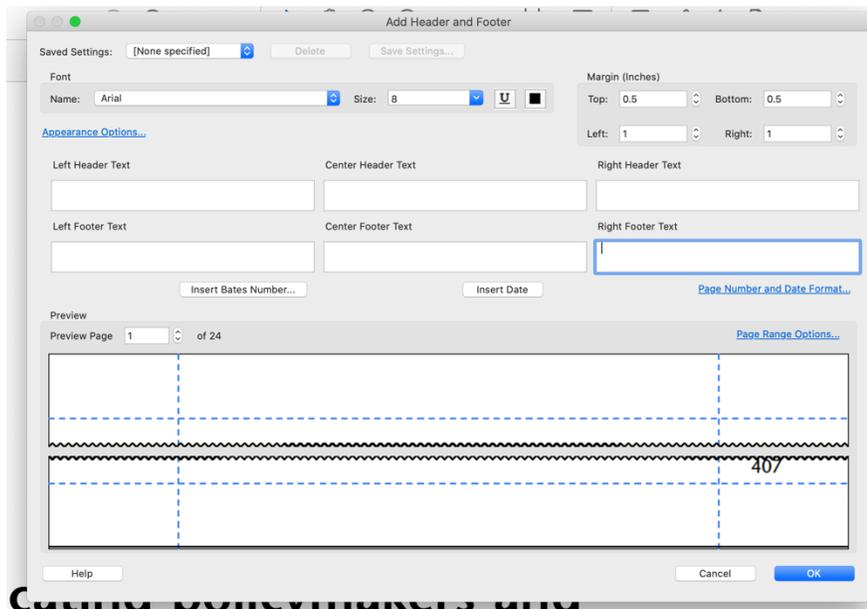


- Once the Stamp tool has been added and selected, you will see a “bates stamping” option at the top of the adobe screen. Click on “bates stamping” then select “add.” Once this is selected, a window will pop up. If you wish to add more documents you can select “add files” otherwise click “okay” to move on to the next step.

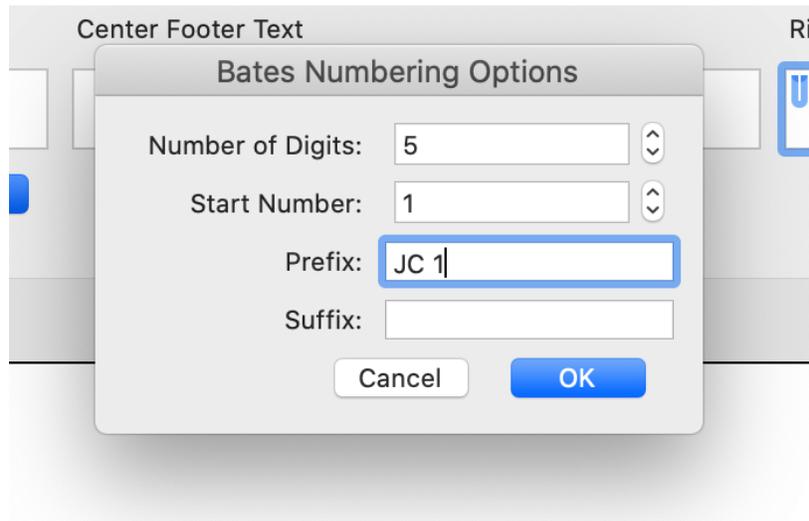




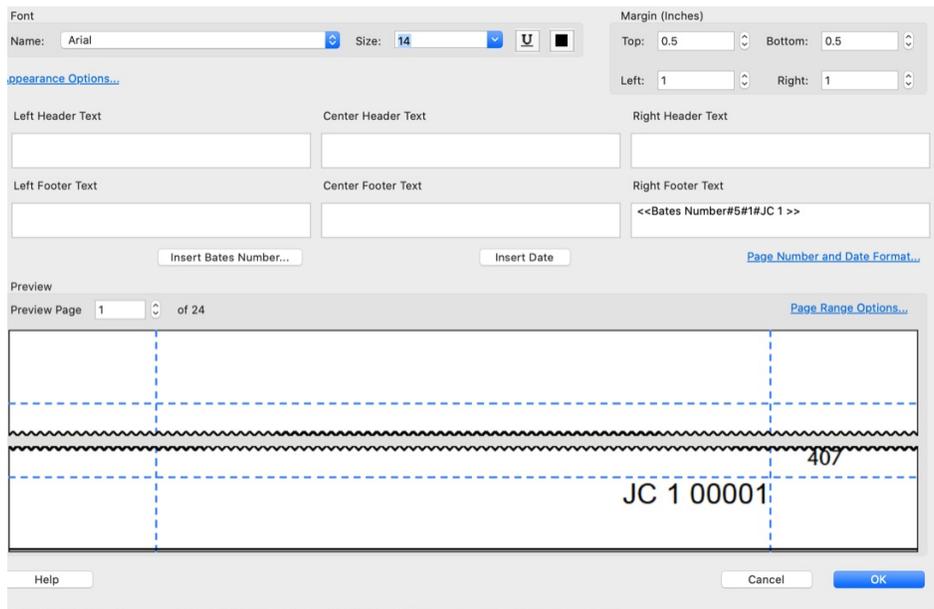
- d. After selecting “okay” you will see a pop-up window that allows you to set the parameters for bates stamp numbering. At LSJA we bates stamp documents in the right footer of the document. Click in the right footer of the document, and select “insert bates stamp number...”



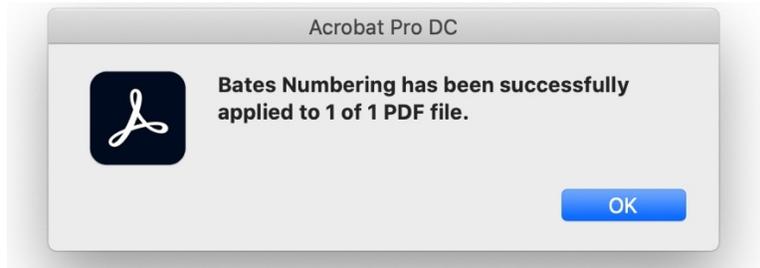
- e. At LSJA we use 5 digits in bates stamping. Make sure to change the number digits to “5”. All bates stamping should start with 1. Set the start number as “1”. All documents should be given a prefix that corresponds with document type. For example, if a document was obtained from a juvenile court, add a prefix that says “JC 1”. If we later receive additional records from that same juvenile court, it will be given a prefix of “JC 2”. After completing the bates numbering options, select “okay”



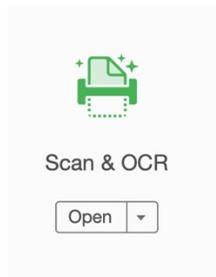
- f. Make sure that the font is set to an easy-to-read font (Arial or Times New Roman). Also make sure to set the font size to 12-14. After completing this step, select “okay” and the bates numbering will be added to the document.



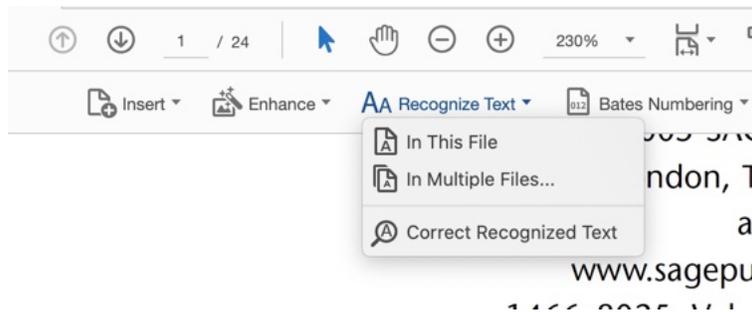
- g. You will know that the numbering is complete when you see this message appear in adobe.



- h. After adding bates numbering to all documents, you will need to OCR the document, so that text can be copied directly from the document and inserted into timelines and theory memos. Start by going back to the tools screen and selecting “Scan and OCR”. Add this function to your toolbar.



- i. Next, go back to the main document and select the “Scan and OCR” function. At the top of the screen, you will see an option to “recognize text”. Select this and choose “In This File”

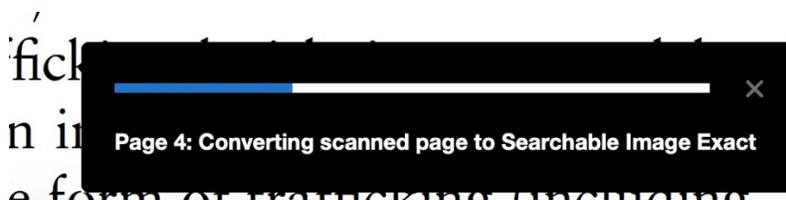


- j. You will see blue bubble pop up at the top of your screen that says “recognize text” select this to begin the OCR process. Depending on the length of the document, this may take up to half an hour.





- k. While Adobe is recognizing the text, you will see this in the bottom right corner of your screen:



- l. After completing these steps, save the document. Then re-upload the bates stamped and OCR'd document to Teams. The bates stamped version of the document should be uploaded to the folder it belongs in. Original/as received documents should remain in the discovery folder. The discovery folder should only reflect all documents as received.

3. Add the document to the timeline.

- a. Once the document is bates stamped and uploaded to the proper folder in Teams, you can begin reading through the document and adding relevant information to the timeline. Each timeline entry should include the date referenced in the document, a quote from the document describing the event (copy and paste this), and the bates stamp number of the page(s) the event occurred on. For major dates such as birthdays, parole dates, conviction dates, certification hearing dates, and release dates from juvenile detention should be centered and highlighted in light grey within the timeline. See example below:

155	10/17/2019	Date Received: Dallas County Juvenile Department Mental Health Psychology Crisis Referral (1pg)	DCID CI 1 00001
23		2/19/2016 - ZT's 13th Birthday	

4. Dig deep into the documents! Make sure to include as much detail as possible in each timeline entry. We want to know that Sally's shirt was wearing a mismatched pair of socks on the second Sunday in May. If the date you are entering also includes a time, such as an email that was sent at 11:20am, be sure to include that time as well. If you are not sure if something should go in the timeline, include it anyway. It is extremely important that you include the bates stamp reference to each timeline entry.