

Customer Service Center Operations Manual

Document Preparation of Imaged Documents CSCOM-903 B

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OVERVIEW

Reviewing CSCs are responsible for remotely reviewing and processing scanned documents submitted by Customer Service Centers (CSCs) through the OnBase workflow system. Documents scanned are to be reviewed, verified, and finalized by the Reviewing CSC.

Reviewing CSC staff are responsible for accessing scanned batches, validating document accuracy, identifying missing or incorrect information, and communicating with the Scanning CSC when corrections or rescans are required. If documentation is incomplete, illegible, or contains potential errors or suspicious activity, appropriate escalation and notification procedures must be followed.

CSCs complying with quality review requests (QRT) must perform doc prep of daily work within their own CSC (refer to [CSCOM-904](#)).

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DEFINITIONS

Scanning CSC – Customer Service Center that submits daily work into OnBase workflow to be imaged.

Reviewing CSC – Customer Service Center responsible for reviewing documents.

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REVIEWING DOCUMENTS REMOTELY

Documents should be reviewed and processed weekly to prevent a large backlog.

Document Preparer (Reviewing CSC)

1. Process applicable work in OnBase. (Refer to [CSCOM-903](#) for document preparation business procedures.
 - a. Access the Scanning CSC's reports to ensure accuracy.
 - i. Review all scanned work and identify any discrepancies based on the reference chart listed below.
 - b. Each application in workflow must be reviewed.
 - c. An automated email will be submitted to the Scanning CSC, informing the CSC that the batch has been completed.
 - d. For missing, illegible, intertwined, or mismatched cover sheets/documents, request the Scanning CSC to scan the document into workflow. If the document cannot be found, a placeholder should be scanned with the appropriate bar code cover sheet.
 - i. Email requests for missing applications and/or rescans must include the following recipients:
 1. First request: Scanning CSC Contacts, Reviewing CSC Management, Remote Processing Work Leader

2. Second request: Scanning CSC Contacts, Scanning CSC District Manager, Implementation Quality Lead, Reviewing CSC Manager, Remote Processing Work Leader
 3. Third request: Forward to Remote Processing Work Leader
- e. If suspicious/fraudulent activity is suspected, notify Receiving CSC Manager for further investigation and instructions.
 - f. If a discrepancy is discovered (based upon chart below), route to Manager queue for review.
 - i. Notify (email) the Receiving CSC Manager of any lien omissions (including Prior Lien Omissions).

Vehicle Transaction Errors
• Altered Bill of Sale/Sales Price
• Lien Omission
• Missing Application (free form to state which application is missing)
• Missing Supporting Documentation for sales tax exemption
• Missing Signature (Seller), Buyer, etc.) (free form to type)
• Missing ownership documents (free form for more information)
• Prior Lien Omission
• Sales & Use tax error (fee form for more information)

Driver Transaction Errors
• Missing applicant signature
• Missing application/supporting document (free form to type)
• Missing CSR signature/DMVID
• Missing parent/guardian signature for minor first-time credential
• Skills test not listed on road test skills log
• Test results not on application (free form for which test results)

2. Submit shred dates to Scanning CSCs for applicable work, as necessary.
 - a. Shred dates should be sent weekly.

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VERIFYING/FINALIZING

Management (Scanning CSC)

1. Review any work in the Manager's queue and finalize CSMA40 errors in accordance with procedures.

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POINTS TO REMEMBER

- Daily work should be processed weekly by the Reviewing CSC to prevent a large backlog.
- Remote processing doc prep cannot be used when performing quality review requests (QRT).

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