



WASHINGTON  
COURTS

**Judicial Information System Committee (JISC)**  
Friday, April 23, 2021 (10:00 a.m. – 12:00 p.m.)

**[Register in advance for this meeting:](#)**

**[April 23<sup>rd</sup> JISC Meeting Registration Link](#)**

***Once registered, you will receive a confirmation email with details on how to join the meeting. Additional Zoom tips and instructions may be found in the meeting packet.***

**AGENDA**

1.	<b>Call to Order</b> a. Introductions b. Announcement of New Member Mr. Derek Byrne, Division II Court of Appeals c. Approval of Minutes	Justice Madsen, Chair	10:00 – 10:10	Tab 1
2.	<b>JIS Budget Update</b> a. 19-21 Budget Update b. Revenue Outlook Update & 21-23 Budget Status	Mr. Ramsey Radwan, MSD Director	10:10 – 10:20	Tab 2
3.	<b>Update on Equipment Replacement Committee</b>	Mr. Ramsey Radwan, MSD Director	10:20 – 10:30	
4.	<b>Legislative Update</b>	Mr. Devon Connor-Green, Contracted AOC Legislative Liaison	10:30 – 10:40	
5.	<b>Discussion on Proposed Amendment to JISC Bylaws: Article 6 – Executive Committee</b>	Ms. Vicky Cullinane, Business Liaison Ms. Paulette Revoir, Administrator, Lynnwood Municipal Court	10:40 – 11:00	Tab 3
6.	<b>JIS Priority Project #1 (ITG 102): Courts of Limited Jurisdiction Case Management System (CLJ-CMS)</b> a. Project Update b. QA Assessment Report	Ms. Cat Robinson, PMP Mr. Allen Mills, Bluecrane	11:00 – 11:10	Tab 4
7.	<b>JIS Priority Project #2 (ITG 252): Appellate Courts – Enterprise Content Management System (AC-ECMS) Project – Phase II</b> a. Project Update b. Case Participant and Public Access Portals	Mr. Martin Kravik, PM Mr. Kevin Ammons, PMP/ Mr. Kevin Cottingham, Data Dissemination Administrator	11:10 – 11:25	Tab 5

8.	<b>JIS Priority Project #3 (ITG 27):</b> <b>Seattle Municipal Court CMS to EDR Data Exchange Update</b>	Ms. Tammy Anderson, Enterprise Data Services Manager	11:25 – 11:35	Tab 6
9.	<b>WSP Modernization – W3 (ITG 242)</b> a. Application changes b. WSP Disposition Data Exchange	Mr. Kevin Ammons, PMP Ms. Tammy Anderson, Enterprise Data Services Manager	11:35 – 11:45	Tab 7
10.	<b>Committee Reports</b> Data Dissemination Committee (DDC)	Judge John Hart, Chair	11:45 – 11:55	Tab 8
11.	<b>Meeting Wrap Up</b>	Justice Madsen, Chair	11:55 – 12:00	
12.	<b>Informational Materials</b> a. Board for Judicial Administration (BJA) Meeting Minutes b. ITG Status Report			Tab 8

Persons with a disability, who require accommodation, should notify Anya Prozora at 360-705-5277 or [Anya.Prozora@courts.wa.gov](mailto:Anya.Prozora@courts.wa.gov) to request or discuss accommodations. While notice 5 days prior to the event is preferred, every effort will be made to provide accommodations, as requested.

## Future Meetings:

### 2021 – Schedule

June 25, 2021

August 27, 2021

October 22, 2021

December 3, 2021

# April 23<sup>rd</sup> Judicial Information System Committee (JISC) Meeting

- All audio has been muted.
- Anya Prozora will start the meeting with roll call, and you will be asked to unmute yourself.
  - *Please mute your audio after roll call.*
- Only JISC Members should have their video feeds on for the duration of the meeting.
- Please leave your video feed **turned off unless you are asking a question and speaking.**
  - **Please mute yourself and turn off your video once you are done speaking.**
- Zoom allows you to hide non video participants should you wish, generally in “More” option on mobile devices or “...” next to a non video participant or in your video settings on a PC.
- If you join the meeting late please wait until you are asked to be identified.

# JISC Zoom Meeting Instructions

When: April 23, 2021, 10:00 AM Pacific Time

Register in advance for this meeting:

[April 23<sup>rd</sup> JISC Meeting Registration Link](#)

After registering, you will receive a confirmation email containing information about joining the meeting.

- In order to attend the Judicial Information System Committee (JISC) meeting you will be **required to register in advance.**
  - After registration you will receive an email with your options to attend the meeting.
  - You can attend via a computer, cellphone, or tablet
  - **All video should be disabled** except for the JISC Chair, Vice Chair, and the presenters (**please do not turn on your video feed during the meeting**)
  - You can use the audio from your laptop, cellphone and tablet or use the dial in numbers provided in the registration email
  - It is recommended you download the Zoom app for the best experience viewing the meeting materials
  - You do **not have to sign in to join the meeting – Click “not now” if prompted**
  - Once you have entered in the required information you will be placed on hold until admitted into the meeting.
1. **Attendance via laptop** – Using your laptop microphone and speakers
    - a. Click on “Click Here to Join”
    - b. Click “Open Zoom” or Cancel and Click “join browser” at the bottom of the screen
    - c. Enter the meeting password from the registration email
    - d. Laptops will generally ask to test your computer audio and microphone.
    - e. Once you have confirmed your audio and microphone work you can close this window and wait for the meeting to start
    - f. Once you have been admitted to the meeting you can choose to join with your Computer Audio or Phone Call
    - g. Choose Computer Audio if your sound settings you tested worked
    - h. Choose Phone Call
    - i. Choose one of the numbers provide
    - j. When prompted enter the meeting ID
    - k. When prompted enter your **unique** participant ID
    - l. **IF** prompted enter the meeting password (you may not be prompted to do this)
    - m. Confirm you want to join with dial in rather than computer audio
  2. **Attendance via Desktop** (No computer audio) – Using the dial in conference number
    - a. Click on “Click Here to Join”
    - b. Click “Open Zoom” or Cancel and Click “join browser” at the bottom of the screen
    - c. Enter the meeting password from the registration email
    - d. Choose “Phone Call” if prompted on the next screen
    - e. Choose one of the numbers provide
    - f. When prompted enter the meeting ID
    - g. When prompted enter your **unique** participant ID
    - h. **IF** prompted enter the meeting password (you may not be prompted to do this)
  3. **Attendance via cellphone/tablet** – Download the Zoom app for IOS or Android

- a. Make note of the password prior to clicking on the link from your phone or tablet
  - b. Click on “Click Here to Join”
  - c. Choose Zoom if the app does not automatically open
  - d. Enter the meeting password
  - e. Wait to be admitted to the meeting
  - f. IF not prompted once admitted to the meeting Click “Join Audio” at the bottom of the screen and choose “Call via Device Audio” (IOS users may see a different set up choose “Call using Internet Audio” if given the option)
  - g. At the bottom of the screen you will have the option to unmute yourself
  - h. If you wish to view the meeting on your phone/tablet **only** and choose to use your cell phone for audio, then choose the dial in option for Android or IOS and follow the steps in **#2 d through h above**.
  - i. If the audio and other options disappear, tap the screen and they will be available to edit
- 4. Attend via Dial in only**
- a. Choose one of the Telephone numbers listed on your registration email
  - b. Enter the Meeting ID when prompted
  - c. Enter # at the next prompt (you will **not** have a Participant ID when attending via telephone only)
  - d. Enter the meeting Password when prompted
  - e. Wait to be admitted into the meeting

**Below is a helpful YouTube tutorial on joining a Zoom Meeting.**

<https://www.youtube.com/watch?v=hIkCmbvAHQQ&feature=youtu.be>

# JUDICIAL INFORMATION SYSTEM COMMITTEE

February 26<sup>th</sup>, 2021  
10:00 a.m. to 12:00 p.m.  
Online Zoom Meeting

## Minutes

### Members Present:

Justice Barbara A. Madsen, Chair  
Judge Scott K. Ahlf  
Ms. Mindy Breiner  
Mr. Joseph Brusic  
Judge John Hart  
Mr. Rich Johnson  
Judge Kathryn Loring  
Mr. Frank Maiocco  
Ms. Barb Miner  
Chief Brad Moericke  
Judge Robert Olson  
Ms. Paulette Revoir  
Mr. Dave Reynolds  
Ms. Dawn Marie Rubio  
Mr. Bob Taylor  
Ms. Margaret Yetter

### Members Absent:

Judge Lisa Worswick

### AOC Staff Present:

Mr. Kevin Ammons  
Mr. Kevin Cottingham  
Ms. Vicky Cullinane  
Ms. Vonnie Diseth  
Mr. Curtis Dunn  
Ms. Christy Hunnefield  
Mr. Mike Keeling  
Mr. Dirk Marler  
Mr. Dexter Mejia  
Ms. Anya Prozora  
Mr. Ramsey Radwan  
Mr. Ian Roberts  
Ms. Cat Robinson

### Guests Present:

Mr. Derek Byrne  
Mr. Devon Connor-Green  
Mr. Allen Mills

## Call to Order

Justice Barbara Madsen called the Judicial Information System Committee (JISC) meeting to order at 10:02 a.m. This meeting was held virtually on Zoom.

Justice Madsen announced Judge Lisa Worswick has been newly appointed to the JISC as the representative for the Court of Appeals (replacing Judge J. Robert Leach). Judge Worswick was unable to attend the meeting and her welcome will be deferred to the April JISC meeting. Justice Madsen also announced that Mr. Rich Johnson will be retiring at the end of March, and this will be his last JISC meeting. Mr. Johnson was recognized and thanked for his longstanding membership on the JISC and for his many years of dedicated service to the judiciary as the Court of Appeals Division I Clerk. The nomination process for Mr. Johnson's replacement on the JISC is currently underway.

## Meeting Minutes

Judge John Hart and Ms. Mindy Breiner each had minor corrections for the December 2020 minutes. Justice Madsen then moved to deem the minutes approved with the noted corrections and asked if there were any opposing votes or abstentions. Ms. Paulette Revoir abstained from the vote as she was absent from the December meeting. The minutes were approved.

## JIS Budget Update

Mr. Ramsey Radwan provided an update on the 19-21 budget. Funding that was unexpended will be left in the fund balance to help balance the 21-23 biennium budget. There were a few questions from legislative staff on the 21-23 request. Mr. Radwan is hopeful the 21-23 request will be funded similarly

to the current biennium. Another economic and revenue forecast will be out on March 17<sup>th</sup>. Mr. Radwan noted “we are still in the hole but are climbing out of the hole,” and noted that “we are okay” on the budget front in this biennium and should be okay for the next biennium. Budget activity will pick up in late February through March 12<sup>th</sup>. The minority caucuses in the House and the Senate put forth budget proposals, but it does not appear that any items in the budget will impact the branch at this time. Justice Madsen asked if there was an allocation in the budget for IT projects that are necessary related to COVID. Mr. Radwan responded there was no flexible funding in December 2020, so they are watching to see what will happen at this point.

### **Legislative Update**

Mr. Devon Connor-Green, the interim legislative liaison for AOC and the BJA, gave an update on the current Legislative session. This was Washington’s first time having virtual sessions, and there has been more public participation. February 22<sup>nd</sup> was the final day for bills to pass out of fiscal committees, and several bills of interest to the courts were voted out before the cut-off and are now awaiting direction.

AOC and BJA are working on many bills of interest to the courts, including making small changes and fixing the language so they do not have negative impacts to courts’ systems. Several of these bills may have large impacts on court processes and may take considerable time and resources to implement. Mr. Connor-Green provided further details on these bills, which include 1320 – Civil Protection Orders, 1412 – Legal Financial Obligations, 5226 – Suspension of Licenses for Traffic Infractions, 5160 – Landlord/Tenant Relations, and 5122 – Jurisdiction of Juvenile Court. He also provided information on two bills AOC is running: 1532 – Court Filing Fees, and 1167 which concerns adding a ninth district judge to the Thurston County Superior Court.

Mr. Connor-Green also noted the Legislature may still hold a special session, but nothing has been announced or scheduled at this time.

Justice Madsen asked about the financial impact to the JIS work and asked if any bills would derail any current projects. Mr. Radwan said that AOC has included in all the judicial impact notes the estimated costs to modify the systems. There will be huge local impacts. AOC and trial courts are worried about the timing (and how fast changes can be implemented) and are expressing those concerns to the Legislature.

### **Decision Point: Approve Revised IT Governance Delegation Matrix**

Mr. Curtis Dunn presented AOC’s proposal to amend the ITG Process Authorization Delegation Matrix. The presentation focused on simplifying the matrix, updating the authorization thresholds, choosing the correct terminology, and understanding the actual functions occurring at the AOC CIO, WA State Court Administrator, and JISC levels. Mr. Dunn assured the Committee that the process that has been in place and successfully used for over a decade—to include multiple multi-million dollar projects—remained the same with respect to the stakeholders’ input and ownership of the process. Only the delegation matrix in the final “Authorization” step was impacted by the proposal. A brief discussion followed.

Justice Madsen asked if there was a motion to approve the revised IT Governance Delegation Matrix.

**Motion:** Judge John Hart

I move to approve that the JISC approve the updated IT Governance Delegation Matrix.

**Second:** Ms. Paulette Revoir

**Voting in Favor:** Justice Barbara Madsen, Judge Scott Ahlf, Ms. Mindy Breiner, Mr. Joseph Brusic, Judge John Hart, Judge Kathryn Loring, Mr. Frank Maiocco, Ms. Barb Miner, Chief Brad Moericke, Judge Robert Olson, Ms. Paulette Revoir, Mr. Dave Reynolds, Ms. Dawn Marie Rubio, Mr. Bob Taylor, Ms. Margaret Yetter

**Opposed:** Mr. Rich Johnson

**Absent:** Judge Lisa Worswick

The motion was passed.

## **JIS Priority Project #1 (ITG 102): Courts of Limited Jurisdiction – Case Management System (CLJ-CMS)**

### **CLJ-CMS Project Update**

Ms. Cat Robinson provided an update on the CLJ-CMS project. EFiled has kicked off with 4 pilot courts: Pierce District Court, Tacoma Municipal Court, Gig Harbor Municipal Court, and Fircrest/Ruston Municipal Court. The CLJ-CMS project completed the GAP analysis in December 2020 through January 2021. The project is now working on the requirements that came out of that analysis, documenting the requirements, and agreeing to the scope of the requirements. They have been working with Tyler to complete the project management plans and the project operational plans (testing, training, and data conversion).

The project has started a series of eFiling Outreach meetings with the DMCMA and DMCJA. There will be outreach events to the Washington State Bar Association (WSBA), hosted by local judges and administrators over the next six weeks. The project team is also maintaining a Frequently Asked Questions document to share with court customers. Mr. Bob Taylor added that the WSBA Board of Governors are very much in favor of eFiling and were excited about the consistency eFiling offers. The superior courts have also expressed excitement. Some brief discussion followed regarding project risks and mitigations.

### **Role of QA in the CLJ-CMS Project & January QA Report**

Mr. Allen Mills, with the project's QA vendor Bluecrane, gave a presentation on the role of quality assurance in technology and Bluecrane's QA approach in the CLJ-CMS project. QA reporting will begin again monthly for the CLJ-CMS starting in February 2021. Bluecrane will work with AOC and Tyler to help improve the project by providing an independent, external, advisory, forward-looking view to identify and avoid upcoming risks. There was some discussion about information gathering for the monthly QA reports. Mr. Mills said about every three to six months, Bluecrane meets with individuals



one-on-one from the Project Steering Committee. He also said that they attend CUWG meetings. Ms. Barb Miner encouraged Bluecrane to also meet with judges and court administrators as part of their information gathering, as it would make the reports more meaningful.

Mr. Mills then reviewed the January Bluecrane Monthly Status Report and said that this would be replaced with the monthly QA report going forward.

### JISC Rule 13 Update

Justice Madsen said there were some obstacles with getting Rule 13 passed. She said there was not unanimity on the rule in the JISC. Justice Madsen asked the Supreme Court Rules Committee to withdraw the rule, so the JISC could discuss it some more. Justice Madsen said that it does not seem that the JISC can come to a consensus, so she recommends that the rule be dropped and the JISC will fall back on the protocol they have used in the past.

### Data Dissemination Committee (DDC) Report

Judge Hart reported that the Data Dissemination Committee did not meet this month, as any access requests had been previously managed, and the meeting was not needed.

### Board for Judicial Administration (BJA) Report

The BJA minutes can be found in the JISC packet under Tab 7.

### Meeting Wrap Up & Adjournment

Justice Madsen requested Mr. Radwan provide an update on the development of an equipment replacement workgroup at the April meeting.

Justice Madsen then adjourned the meeting at 11:55 am.

### Next Meeting

The next meeting will be April 23, 2021, via Zoom from 10:00 a.m. to 12:00 p.m.

### Action Items

	Action Items	Owner	Status
10/23/2020	Formalize Equipment Replacement Workgroup and develop a charter.	AOC/Ramsey Radwan	Pending
10/23/2020	Update ITG delegation matrix dollar approval levels.	AOC/Vicky Cullinane, Curtis Dunn	Completed

**Administrative Office of the Courts**  
**Information Services Division**  
**Project Allocation & Expenditure Update**  
**2019-2021 Allocation**

Biennial Information as of 2/28/2021 (Fiscal Month 20)

Initiatives--JIS	TOTAL ALLOTTED	EXPENDED AND ENCUMBERED TO DATE	BALANCE
Courts of Limited Jurisdiction - Case Management System (CLJ-CMS)	\$13,482,274	\$4,560,657	\$8,921,617
Appellate Courts - Electronic Content Management System (AC-ECMS)	\$2,207,000	\$1,534,728	\$672,272
<b>TOTAL 2019-2021</b>	<b>\$15,689,274</b>	<b>\$6,095,385</b>	<b>\$9,593,889</b>



## Revenue and Budget Update-April 2021 JISC

### State Revenue Summary (statewide)

The March 17, 2021 forecast is substantially higher than the previous forecast. Revenues for the current and ensuing biennium are now back to pre-pandemic levels.

### 2021-2023 Budget

As of April 2021:

Both the House and Senate have released their versions of the operating budget.

Highlights include:

#### Senate:

All of the budget requests submitted by AOC are included.

The Senate budget also proposes funding for:

An eviction resolution program, court costs associated with the Blake decision and, court costs for the Uniform Guardianship

A few other Senate specific funding items based upon Senate bills

#### House:

The House proposal would fund some, but not all of AOC's requests.

Those not funded include:

Judicial Need Development

Court Equity Access Team

The House budget also proposes a budget proviso that would place the funding and management of the CLJ CMS and INF projects with the Office of the State Information Officer (OCIO) and the Office of Financial Management (OFM).

Several communications have been sent regarding our objection to this.

The House budget would also provide funding for court costs associated with the Blake decision and an LFO refund pool for refunds related to the Blake decision.

A few other House specific funding items are based upon House bills.

Neither budget proposal includes budget reductions.

### American Rescue Plan Act Funding (federal)

On March 22, 2021, Chief Justice González and Dawn Marie Rubio co-authored a letter to legislative leadership requesting approximately \$85-\$102 million for Washington courts. No word has been received regarding the request as of this writing. Both the SCJA and DMCJA have also communicated the need for funding.



### **CARES-For Courts and County Clerk's Offices**

Approximately \$1.8 million of the \$13.3 million remains. Funding is focused on working through the trial court case backlog.

### **CARES-For Eviction Resolution Program**

\$976,000 has been awarded and is being distributed to pilot Eviction Resolution Programs (ERP) in six counties. Funding between January 1, 2021, and June 30, 2021, will go to the Department of Commerce to distribute to the six pilot counties (ESHB 1368). Funding for 2021-2023 will most likely go to AOC either for a continuation of the pilot programs or for a statewide time-limited implementation (the current proposal is 2SSB 5160).

**JUDICIAL INFORMATION SYSTEM COMMITTEE  
BYLAWS  
As amended September 6, 2013**

**Article One - Membership**

**Section 1:** Members of the Judicial Information System Committee shall be appointed by the Chief Justice in accordance with the Judicial Information System Committee Rules (JISCR).

**Section 2:** The Committee by the adoption of a motion may designate ex-officio members. Ex-officio members shall not vote.

**Article Two - Officers**

**Section 1:** In accordance with JISCR 2(c) the Supreme Court Justice shall be the chair and the members of the committee shall elect a vice-chair from among the members who are judges.

**Section 2:** The chair, in addition to any duties inherent to the office of chair, shall preside at each regular or special meeting of the committee, sign all legal and official documents recording actions of the committee, and review the agenda prepared for each meeting of the committee. The chair shall, while presiding at official meetings, have full right of discussion and vote.

**Section 3:** The vice-chair shall act as chair of the committee in the absence of the chair.

**Article Three - Meetings**

**Section 1:** Regular meetings of the committee shall be held bi-monthly pursuant to schedule available through the Administrative Office of the Courts. The chair may, at his or her discretion, cancel a meeting. Meetings of the committee and all standing or special committees may be held by teleconference, videoconference, or any technology that allows all persons participating to hear each other at the same time.

**Section 2:** The chair may call a special meeting at any time. Notice of a special meeting must be given at least twenty-four hours before the time of such meeting as specified in the notice. The notice shall specify the time and place of the special meeting and the business to be transacted.

**Section 3:** Agenda - The agenda for all regular meetings of the committee shall be recommended by the ISD Director and approved by the chair.

**Section 4:** Records of Committee Action - All business transacted in official committee meetings shall be recorded in minutes and filed for reference with the Administrative Office of the Courts. A staff member from the Administrative Office of the Courts must attend all regular and special meetings of the committee, and keep official minutes of all such meetings. Official committee minutes will be distributed in a timely manner to all members and persons who request copies on a continuing basis.

**Section 5:** Parliamentary Procedure - Eight members of the committee shall constitute a quorum, and no action shall be taken by less than a majority of the committee members present. In questions of parliamentary procedure and other relevant matters not specifically provided for in these bylaws, the actions of the committee shall be conducted according to Robert's Rules of Order, newly revised.

**Section 6:** The chair shall have the right to limit the length of time used by a speaker for the discussion of a subject. Nonmembers may speak if recognized by the chair.

#### **Article Four - Fiscal Matters**

**Section 1:** Expenses - Members shall be compensated for necessary travel expenses to attend meetings of the JIS Committee, its Executive Committee, and the Data Dissemination Committee according to State of Washington travel regulations.

#### **Article Five - Amendments**

**Section 1:** Bylaws of the committee may be amended by majority vote of the committee provided such changes are proposed at least one meeting prior to the meeting at which the vote is taken. Bylaws may be revised by unanimous vote of the membership of the committee at the same meeting at which the revision is originally proposed.

#### **Article Six - Executive Committee**

**Section 1:** Purpose - The Judicial Information System Committee's (JISC) Executive Committee is created to act on behalf of the entire JISC regarding those matters specified herein between regular JISC meetings. It shall be the objective of the Executive Committee to facilitate communication among JISC standing committee chairs, ISD management, and the JISC chair; to improve the quality of work done by the JISC; and to serve as a voice of the user community on JIS issues.

**Section 2:** Powers and Responsibilities - The Executive Committee shall have the power and responsibility to act only on the following matters:

1. Review and approve JIS budget requests for submission to the legislature.
2. Review and recommend for submission to the full committee recommendations on governance and other policy matters.
3. Offering advice, oversight, and consultation to ISD management.
4. Representing the JISC in communications with the legislature and, as needed, with other interested groups.
5. Other powers as assigned by the JISC.

**Section 3:** Composition and Leadership - The Executive Committee membership shall consist of the following drawn from the membership of the JISC:

- The JISC Chair
- The JISC Vice Chair
- The Administrator for the Courts
- A county clerk appointed by the JISC Chair

- One judge each from the court of appeals, the superior courts and the courts of limited jurisdiction, provided that the vice-chair shall be deemed the judge representing their level of court on the executive committee.

The JISC Chair shall be the Executive Committee Chair.

**Section 4: Voting** - Each member of the Executive Committee is entitled to one vote. Members present shall be a quorum. Majority vote shall decide all issues.

**Section 5: Meetings** - Meetings of the Executive Committee shall be called by the Chair of the JISC as needed.

### **Article Seven - Data Dissemination Committee**

**Section 1: Purpose** - The Judicial Information System Committee's (JISC) Data Dissemination Committee is created to act on behalf of the entire JISC to address issues with respect to access to the Judicial Information System and the dissemination of information from it.

**Section 2: Powers and Responsibilities** - The Data Dissemination Committee shall have the power and responsibility to act only on the following matters:

1. Review and act on requests for access to the JIS by non-court users in cases not covered by existing statute, court rule or JIS policy.
2. Hear appeals on administrative denials of requests for access to the JIS or for dissemination of JIS data.
3. Recommend to the JIS Committee policy on access to the JIS.
4. Recommend to the JIS Committee changes to statutes and court rules regarding access to court records.
5. Request written opinions of the Washington State Office of the Attorney General through the State Court Administrator on questions of law related to access to and dissemination of JIS data.
6. Other powers as assigned by the JISC.

**Section 3: Composition and Leadership** - The Data Dissemination Committee membership shall consist of the following drawn from the membership of the JIS Committee, appointed by the JISC Chair:

- The JISC Vice Chair
- Two superior court judges
- Two court of limited jurisdiction judges
- A county clerk
- An appellate court representative
- A superior court or juvenile court administrator
- A member of the District and Municipal Court Management Association

The JISC Vice Chair shall be the Data Dissemination Committee Chair.

**Section 4:** Voting - Each member of the Data Dissemination Committee is entitled to one vote. Members present shall be a quorum. Majority vote shall decide all issues.

**Section 5:** Meetings - The Data Dissemination Committee shall meet bi-monthly. The chair may, at his or her discretion, cancel a meeting. The chair may call a special meeting at any time. Notice of a special meeting must be given at least twenty-four hours before the time of such meeting as specified in the notice. The notice shall specify the time and place of the special meeting and the business to be transacted.



## JISC Bylaws—Proposed Amendments to Article Six re JIS Executive Committee

### Article Six - Executive Committee

**Section 1:** Purpose - The Judicial Information System Committee's (JISC) Executive Committee is created to act on behalf of the entire JISC regarding those matters specified herein between regular JISC meetings.

**Section 2:** Powers and Responsibilities - The Executive Committee shall ~~have the power and responsibility to act only on the following matters:~~

1. Act on behalf of the entire JISC in an emergency if, in the discretion of the chair, it is impractical to hold a special meeting of the JISC.
- ~~1. Review and recommend for submission to the full committee recommendations on governance and other policy matters.~~
- ~~2. Provide advice, oversight, and consultation to ISD management.~~
- ~~3. Representing the JISC in communications with the legislature and, as needed, with other interested groups.~~
- ~~4. Other powers as assigned by the JISC.~~
2. Provide advice and consultation to JISC chairs, as needed.
3. Facilitate communication with their respective associations.

**Section 3:** Composition and Leadership - The Executive Committee membership shall consist of the following drawn from the membership of the JISC:

- The JISC Chair
- The JISC Vice Chair
- The AOC State Court Administrator
- One judge each from the court of appeals, the superior courts and the courts of limited jurisdiction, provided that the vice-chair shall be deemed the judge representing their level of court on the executive committee.
- A county clerk
- A court administrator from the superior courts
- A court administrator from the courts of limited jurisdiction

The JISC Chair shall be the Executive Committee Chair.

**Section 4:** Voting - Each member of the Executive Committee is entitled to one vote. Members present shall be a quorum. Majority vote shall decide all issues.

**Section 5:** Meetings - Meetings of the Executive Committee shall be called by the Chair of the JISC as needed.



# **Courts of Limited Jurisdiction Case Management System (CLJ-CMS)**

## **Project Update**

Cat Robinson, PMP  
CLJ-CMS Project Manager

April 23, 2020



# Recent eFiling Project Activity

- ✓ Worked with all six regions to provide information on the Merchant Identification Documentation (MID) to the administrators
- ✓ Sent all MID documentation to the courts
- ✓ Finalized MID documentation for all pilot courts
- ✓ Provided a training environment to Pilot Courts for familiarization



# Recent CMS Project Activity

- ✓ Installed Odyssey 2019 to AOC servers
  - ✓ Development
  - ✓ Production
- ✓ Completed Case Initiation Configuration
- ✓ Completed Case Processing Configuration

# eFiling Outreach

- ✓ Outreach to the WSBA hosted by local judges and administrators
  - ✓ Pilot Courts – 2/26/2021
  - ✓ Group 1 – 3/3/2021
  - ✓ Group 2 – 3/17/2021
  - ✓ Group 3 – 3/19/2021
  - ✓ Group 4 – 3/26/2021
  - ✓ Group 5 – 3/30/2021
  - ✓ Group 6 – 4/2/2021
- ✓ Outreach to the Northwest Washington user community

# eFiling Communications

- ✓ eFile implementation requirements/imperatives
- ✓ eFile rollout plan
- ✓ Model local rules for mandatory eFiling
- ✓ Merchant IDs for non-pilot courts
- ✓ Notice to Courts re: Bar association town halls/info sessions with Tyler and AOC
- ✓ Communication with WSBA regarding OFS info sessions
- ✓ Info session communication for each region
- ✓ eFile FAQ



# Work in Progress

- Finalizing the development projects with Tyler, which were identified in gap analysis
  - 34 identified development projects
- Continuing installation of CLJ-CMS Odyssey to internal AOC servers
- Weekly eFiling check in meetings with all regions to prepare for go-live events
- Continuing development configuration

# Active Project Risks – March 2021

Total Project Risks			
Low Risk	Medium Risk	High Risk	Closed
6	6	8	24

High Risks Status		
Risk	Probability/Impact	Mitigation
<b>Middleware Solution</b> – The A&S group is exploring new middleware solutions for AOC. The project needs the middleware to bring data from Tyler to AOC.	Likely/Moderate	Ensure that the ability to migrate the current in-house solutions is available within the proposed solution which eliminates the later need for rework.
<b>MID Documentation</b> - Tyler Tech requires that eFile users use Chase Payment Tech as their processor for payments. At least one of the pilot courts uses a different bank as a sole vendor.	Likely/Moderate	AOC leadership will provide guidance to the financial users in the court communities as to the role of a payment processor.



# Active Project Risks – March 2021

High Risks Status		
Risk	Probability/Impact	Mitigation
<p><b>Tyler Supervision</b> – Tyler has not done a statewide implementation of their new Supervision module. Previous implementations have always been with individual probation departments.</p>	Likely/Major	AOC PM and Tyler PM are working closely to best align the processes of the two integrations.
<p><b>Tyler Supervision/Odyssey Integrations</b> – The two products are not yet seamlessly integrated.</p>	Likely/Moderate	AOC PM and Tyler PM meeting regularly to discuss what is necessary for integrations.
<p><b>Funding</b> – The state budget is tight and COVID has added extra complexity. If costs are cut, then there can be project impacts.</p>	Moderate/Moderate	<p>The required decision package has been submitted for the CLJ courts. Spending has been limited - only spending as necessary.</p> <p>If additional cost savings are required, then being careful and deliberate on where to cut costs will be crucial.</p>

# Active Project Risks – March 2021

High Risks Status		
Risk	Probability/Impact	Mitigation
<p><b>Local Integrations</b> – Some courts have their own systems that they would prefer be integrated with Odyssey.</p>	Moderate/Moderate	Integrations to local court applications is deemed out of scope for the CLJ-CMS project. The project team will work with the courts to provide solutions that don't involve an integration wherever possible.
<p><b>Performance Issues</b> – It is possible that users will feel that Odyssey works less efficiently than the legacy system due to changing processes and procedures.</p>	Moderate/Moderate	Working with the SC Team to understand the perceived issues. Focusing on messages to the courts. Educating the courts on ways to work with the new system
<p><b>COVID-19</b> – Working remotely adds complexity to the day-to-day business needs of the project.</p>	Moderate/Moderate	AOC has used remote capabilities to conduct meetings for many years. The project team is comfortable with remote work and has what is needed to be successful.

# Active Project Risks – March 2021

High Risks Status		
Risk	Probability/Impact	Mitigation
<p><b>IT Constraints</b> – When users experience technical difficulties IT support is not as readily available as if the user was working in the office.</p>	Moderate/Moderate	<p>If users experience issues, encourage them to reach out to IT support and request assistance. If additional support is required, work with the infrastructure team to help.</p>
<p><b>Equipment Funding</b> – Additional funds may be needed to assist some courts with the local equipment purchases.</p>	Moderate/Moderate	<p>If the CLJ-CMS project uses a similar funding model to the SC-CMS, then there are additional complexities to consider. There are significantly more CLJ courts which adds to the need. Working with the budget office to determine the best path.</p>

# Next Steps

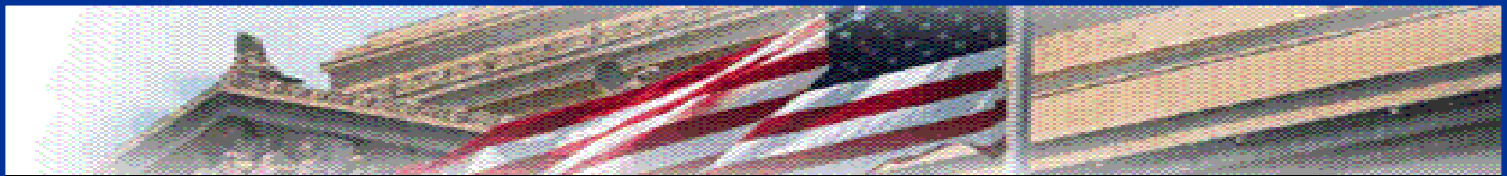
Milestone	Date
eFiling – Kick off meetings	Start – 19 April 2021
CMS - Calendaring Configuration	Start – 3 May 2021
CMS - Financials Configuration	Start – 24 May 2021
CMS – Disposition Processing Configuration	Start – 7 June 2021
eFiling – Pilot Court Go-Live	7 June 2021
CMS – Security Workshop Configuration	Start – 14 June 2021
CMS – Clerk Edition Workshop Configuration	Start – 28 June 2021



# Independent Quality Assurance Update

Mr. Allen Mills  
Bluecrane, Inc.

April 23, 2020



*bluecrane*

***Management Consulting***

***for***

***State and Local  
Governments***

***Quality Assurance***

***Executive Advisement***

***Project Oversight***

***Project Management***

***Independent Verification and  
Validation (IV&V)***

***Risk Reduction***

# **Quality Assurance Assessment**

for the

## **State of Washington**

### **Administrative Office of the Courts (AOC)**

### **CLJ-CMS Project**

**March 2021**

Prepared by

**Bluecrane, Inc.**



*bluecrane* ®



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March 31, 2021

Honorable Barbara Madsen, Justice  
Washington Supreme Court

Ms. Dawn Marie Rubio  
Administrator, Administrative Office of the Courts

Dear Justice Madsen and Ms. Rubio:

*bluecrane* has completed its Quality Assurance Assessment of the CLJ-CMS Project for the month of March 2021.

This document is structured as follows:

1. Executive Summary and Assessment Dashboard.
2. A detailed report of our CLJ-CMS assessment as of March month-end.
3. An explanation of our approach for those readers that have not seen one of our assessments previously.

Please contact me with any questions or comments.

Sincerely,

Allen Mills



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## **1. Executive Summary**

### **1.1 Executive Overview**

#### **Background**

The Courts of Limited Jurisdiction – Case Management System (CLJ-CMS) Project consists of three primary areas of activity, namely:

- e-Filing
- Supervision
- Case Management

These three high-level “workstreams” or “sub-projects” ultimately combine to deliver an integrated solution for participating district and municipal courts (and some other entities such as violations bureaus). However, work in each sub-project is being planned and conducted as a separate activity with a keen awareness of interdependencies and the interrelationships that will eventually come into play. For these reasons, much of our risk analysis will assess the three sub-projects individually. For consistency in terminology, we will reserve the term “CLJ-CMS” to refer to the three combined sub-projects and use the terms “e-Filing,” “Supervision,” and “Case Management” to refer to the individual efforts.

#### **Key Updates Since Our February Report**

At a high-level, our March risk assessment found that the CLJ-CMS Project is continuing to make good progress, despite the lack of an approved integrated project schedule. Highlights of our risk assessment include:

- **Tyler is Significantly Behind in Providing its Deliverables**
  - ✓ Tyler is consistently failing to meet deliverable due dates. The list of late deliverables quickly accumulated in March. While “start-up” challenges are not unusual and the remote work environment necessitated by the on-going COVID-19 crisis adds complexity to the effort, AOC recognizes that this is not a sustainable approach and must be addressed quickly.
  - ✓ AOC took action on March 9 by communicating its dissatisfaction with the current situation and demanding that Tyler provide, among other things, (1) a realistic schedule that is mutually agreed to by both AOC and Tyler and (2) a proposal to address issues that led to the current slippages to help ensure the issues are not repeated going forward.
  - ✓ AOC and Tyler met in mid-March to discuss the current issues and how best to move forward.
  - ✓ On March 25, Tyler provided proposed dates for “catching-up” on delayed deliverables.
  - ✓ In addition, Tyler has proposed more frequent “executive check-ins” going forward.
  - ✓ Without timely mitigation, the CLJ schedule could be at-risk. The actions that AOC has taken bode well for resolving the current issues. For now, we assess the current situation as a “yellow” risk with the level of risk increasing. Given AOC’s attention to the



issues and actions that are already underway, we anticipate that this risk area will be “blue” by April or May. We will monitor closely.

➤ **Lack of an Approved Integrated Schedule**

- ✓ One of the Tyler deliverables that has not been completed with satisfactory quality is the integrated project schedule. The integrated project schedule from Tyler was due October 28, 2020. A draft was delivered on January 29, 2021, three months late. Deficiencies in the completeness of the schedule have been identified by AOC, and a new draft is now due on April 9, 2021.
- ✓ The integrated project schedule should be a schedule for each of the sub-projects (e-Filing, Supervision, and Case Management). In addition, it should include the work of AOC (OCM, technical, project management, court liaison, communications, testing, training, etc.) and the work of any partner organizations (e.g., a state agency that has to conduct integrations-related work, if any).
- ✓ Work is moving ahead on e-Filing, despite the challenges with the integrated schedule deliverable.
- ✓ In terms of “what does success look like” to resolve this risk, we respectfully submit that AOC adopt the following criteria:
  - ❖ Whether in a single schedule (file) (which we prefer and highly recommend) or otherwise (multiple files), the “integrated schedule” should provide **confidence** that:
    - All **elements of work** are captured to some level (even if fairly high-level)
    - An analysis has been conducted to determine the **resources** necessary to conduct all of the work and an analysis has been conducted to ensure that resources are **not over-allocated** (i.e., creating non-sustainable levels of effort for some resources)
    - **Interdependencies** are identified (across “workstreams,” etc.)
    - The Program is currently **executing** against the schedule with success
  - ❖ If the schedule is spread across multiple files, then there should be a documented approach that explains **how**:
    - An adequate resource analysis was conducted *across multiple artifacts*
    - A comprehensive identification of interdependencies was conducted *across multiple artifacts*
    - The critical path was identified *across multiple artifacts*
    - The integrated schedule will be baselined *across multiple artifacts*



- ❖ If these things can be demonstrated with a high degree of confidence, then the schedule is ready to be **baselined** so that future progress can be measured against it.
- ✓ The foregoing “definition of success” is not unusual or overly demanding. It is “part and parcel” of **the work** of project management **and is a contractual Tyler deliverable**.
- ✓ We acknowledge that producing an integrated schedule is often a challenge for new projects, especially those that contract with a third-party vendor for a technical solution. Even large global vendors sometimes struggle to create a comprehensive schedule that is **not** centric to their SOW only. We have seen this in the State of Washington on more than one project. However, that is not an excuse. It is simply an acknowledgement of how important it is for the state agency client (in this case, AOC) to demand a quality schedule that is comprehensive. We applaud AOC and specifically the CLJ Project Manager for “riding herd” on this effort.
- ✓ Because of the criticality of the integrated project schedule and the ongoing delays in the deliverable, we have noted “yellow” risks in all schedule-related areas. The risks are increasing and rapidly approaching “red” ratings.
- **Court Community Questions on e-Filing Remain**
  - ✓ As we noted in our February report, the predominant challenges with e-Filing are in the OCM space. There are numerous questions among the court community related to:
    - ❖ Costs and mandatory aspects of fees
    - ❖ Timing, especially among courts that may be five years away from the implementation of case management with Odyssey
    - ❖ Nature of the mandate for e-Filing (i.e., can a court “opt-out” or not?)
    - ❖ Other aspects of e-Filing
  - ✓ The FAQ produced by the project is aimed at addressing these questions and providing a baseline reference document for courts. The project team has conducted several webinars (with attendance by several hundred individuals from the court community) to better inform stakeholders about the planned e-Filing capability and implementation.
  - ✓ The Tyler project manager for e-Filing has been very responsive to the AOC project manager and team. Work on e-Filing continues to move forward as the questions noted above are addressed and communications to the courts to share information proceed. With the specific activities related to e-Filing well-defined, work is able to proceed despite the lack of an overall integrated CLJ-CMS schedule.
  - ✓ We have captured these risks under “Scope: e-Filing” and “OCM: e-Filing” and assessed them as “yellow,” with notations that the risks are increasing as time passes.
- **Other Risks of Note**
  - ✓ **Program Staffing** continues to be a challenge. A “Test Lead” and a “Conversion Lead” started on March 1. Recruiting for a Deputy Project Manager and an “Integrations Lead”



continues. We assess risks in this area as “Risk Being Managed” and use our “blue” rating color.

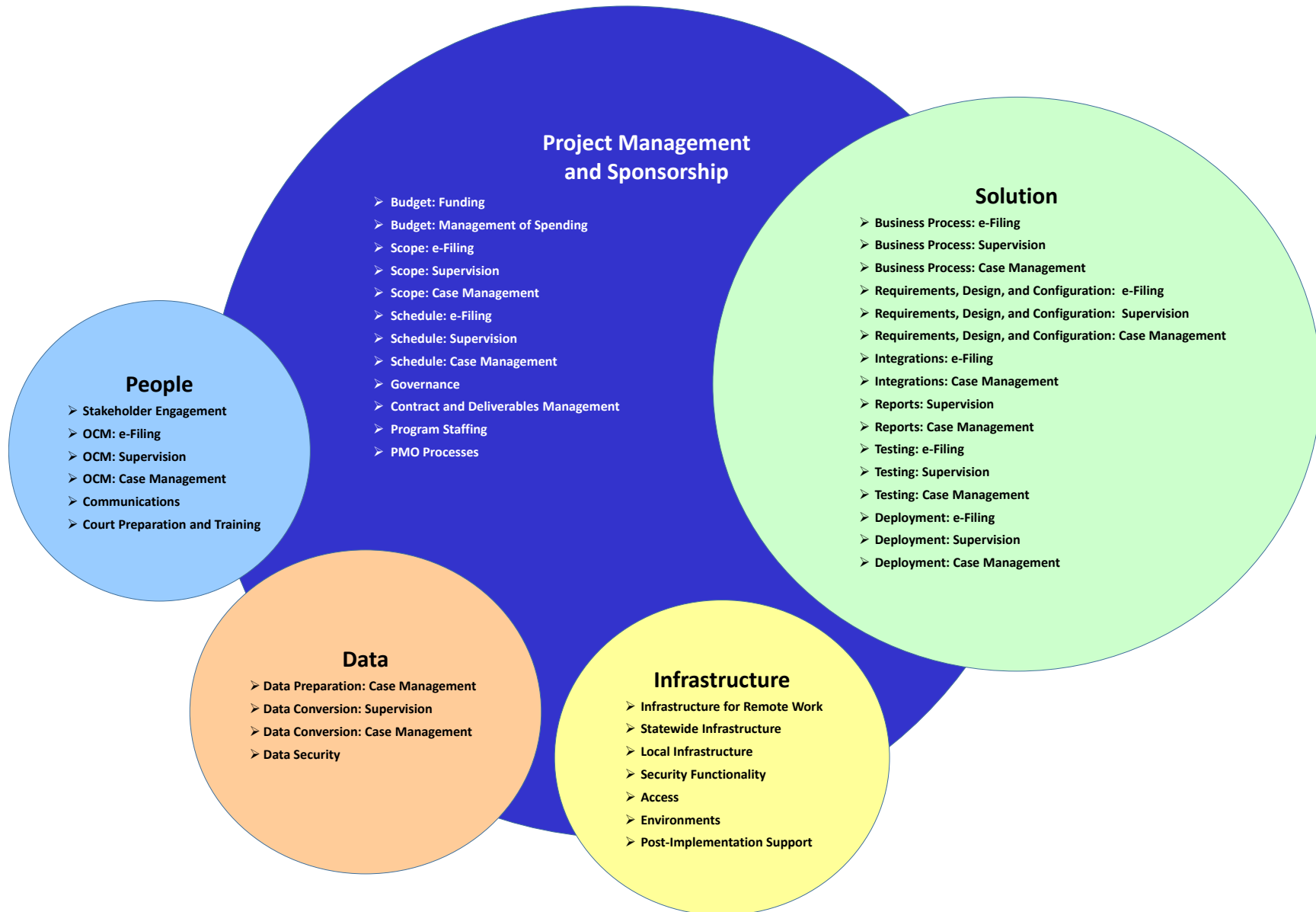
- ✓ **Integrations: Case Management** is an area that we continue to rate “yellow.” Discussions among technical staff continue as AOC strives to determine a single consistent approach for integrations on all aspects of the CLJ-CMS Project.
- ✓ **Environments** is an area that we assess as “yellow.” AOC should work to quickly resolve the open issue of number of tenets required for supervision and have Tyler update the integrated schedule deliverable to reflect the decision.

## 1.2 Areas of Assessment

For this Independent QA Assessment, we have focused on 45 areas of assessment as depicted in Figure 1. We have grouped the areas into our familiar categories of :

- **Project Management and Sponsorship**
- **People**
- **Solution**
- **Data**
- **Infrastructure**

In keeping with our dislike of “cookie cutter” approaches, we tailored the specific areas of assessment for relevance and importance to CLJ-CMS *at this stage of its program lifecycle*. Some of the areas noted in the diagram have been assessed at a relatively detailed level, while others are so early in their lifecycle that a more thorough assessment will come later.



**Figure 1. Areas of CLJ-CMS Project Assessed for Risks**



### 1.3 Executive “At-a-Glance” QA Dashboard

The following tables provide a summary of our risk assessment ratings for this month and the previous two months (February 2021 is our first month of reporting; future reports will populate prior month columns.) Detailed findings, risk explanations, and recommendations for risk response are provided in Section 2 of this report. As a reminder to the reader, “blue” items indicate areas of ongoing risk; however, the mitigation and other response activities of the Program for blue items are assessed as adequate for the current review period.

**Table 1. Summary Dashboard of QA Assessment Results**

<b>Project Management and Sponsorship</b>			
<b>Assessment Area</b>	<b>March 2021</b>	<b>February 2021</b>	<b>January 2021</b>
Budget: Funding	No Risk Identified	No Risk Identified	Not Assessed
Budget: Management of Spending	No Risk Identified	No Risk Identified	Not Assessed
Scope: e-Filing	Risk <i>(risk increasing)</i>	Risk	Not Assessed
Scope: Supervision	No Risk Identified	No Risk Identified	Not Assessed
Scope: Case Management	No Risk Identified	No Risk Identified	Not Assessed
Schedule: e-Filing	Risk <i>(risk increasing)</i>	Risk	Not Assessed
Schedule: Supervision	Risk <i>(risk increasing)</i>	Risk	Not Assessed
Schedule: Case Management	Risk <i>(risk increasing)</i>	Risk	Not Assessed
Governance	No Risk Identified	No Risk Identified	Not Assessed
Contract and Deliverables Management	Risk <i>(risk increasing)</i>	No Risk Identified	Not Assessed
Program Staffing	Risk Being Managed	Risk Being Managed	Not Assessed



**Project Management and Sponsorship**

Assessment Area	March 2021	February 2021	January 2021
PMO Processes	No Risk Identified	No Risk Identified	Not Assessed

**People**

Assessment Area	March 2021	February 2021	January 2021
Stakeholder Engagement	No Risk Identified	No Risk Identified	Not Assessed
OCM: e-Filing	Risk <i>(risk increasing)</i>	Risk	Not Assessed
OCM: Supervision	No Risk Identified	No Risk Identified	Not Assessed
OCM: Case Management	No Risk Identified	No Risk Identified	Not Assessed
Communications	No Risk Identified	No Risk Identified	Not Assessed
Court Preparation and Training	No Risk Identified	No Risk Identified	Not Assessed

**Solution**

Assessment Area	March 2021	February 2021	January 2021
Business Process: e-Filing	No Risk Identified	No Risk Identified	Not Assessed
Business Process: Supervision	No Risk Identified	No Risk Identified	Not Assessed



<b>Solution</b>			
<b>Assessment Area</b>	<b>March 2021</b>	<b>February 2021</b>	<b>January 2021</b>
Business Process: Case Management	No Risk Identified	No Risk Identified	Not Assessed
Requirements, Design, and Configuration: e-Filing	No Risk Identified	No Risk Identified	Not Assessed
Requirements, Design, and Configuration: Supervision	No Risk Identified	No Risk Identified	Not Assessed
Requirements, Design, and Configuration: Case Management	No Risk Identified	No Risk Identified	Not Assessed
Integrations: e-Filing	No Risk Identified	No Risk Identified	Not Assessed
Integrations: Case Management	Risk	Risk	Not Assessed
Reports: Supervision	No Risk Identified	No Risk Identified	Not Assessed
Reports: Case Management	No Risk Identified	No Risk Identified	Not Assessed
Testing: e-Filing	Not Started	Not Started	Not Assessed
Testing: Supervision	Not Started	Not Started	Not Assessed
Testing: Case Management	Not Started	Not Started	Not Assessed
Deployment: e-Filing	No Risk Identified	No Risk Identified	Not Assessed
Deployment: Supervision	No Risk Identified	No Risk Identified	Not Assessed
Deployment: Case Management	No Risk Identified	No Risk Identified	Not Assessed





<b>Data</b>			
<b>Assessment Area</b>	<b>March 2021</b>	<b>February 2021</b>	<b>January 2021</b>
Data Preparation: Case Management	No Risk Identified	No Risk Identified	Not Assessed
Data Conversion: Supervision	No Risk Identified	No Risk Identified	Not Assessed
Data Conversion: Case Management	Not Started	Not Started	Not Assessed
Data Security	No Risk Identified	No Risk Identified	Not Assessed

<b>Infrastructure</b>			
<b>Assessment Area</b>	<b>March 2021</b>	<b>February 2021</b>	<b>January 2021</b>
Infrastructure for Remote Work	Risk Being Addressed	Risk Being Addressed	Not Assessed
Statewide Infrastructure	No Risk Identified	No Risk Identified	Not Assessed
Local Infrastructure	No Risk Identified	No Risk Identified	Not Assessed
Security Functionality	No Risk Identified	No Risk Identified	Not Assessed
Access	No Risk Identified	No Risk Identified	Not Assessed
Environments	Risk	Risk	Not Assessed
Post-Implementation Support	No Risk Identified	No Risk Identified	Not Assessed



## 2. Detailed Assessment Report

Table 2. Detailed Findings and Recommendations from *bluecrane's* QA Risk Assessment

Project Management and Sponsorship					
Assessment Area	Three-Month Rolling Risk Levels			Detailed Risk Assessment	
	Mar 2021	Feb 2021	Jan 2021	Risks and Findings	<i>bluecrane</i> Recommendations
Budget: Funding	No Risk Identified	No Risk Identified	Not Assessed	<ul style="list-style-type: none"> <li>✓ <b>FINDINGS:</b> Funding allocated to the project is consistent with the approved plan. The recently announced state budget surplus bodes well for continued funding.</li> </ul>	N/A
Budget: Management of Spending	No Risk Identified	No Risk Identified	Not Assessed	<ul style="list-style-type: none"> <li>✓ <b>FINDINGS:</b> The project is being managed within the approved budget.</li> </ul>	N/A
Scope: e-Filing	Risk <i>(risk increasing)</i>	Risk	Not Assessed	<ul style="list-style-type: none"> <li>✓ <b>RISK:</b> If some courts delay their implementation of e-Filing, then the original scope of the effort to implement e-Filing first in all CLJ-CMS courts may be in jeopardy.</li> <li>✓ <b>FINDINGS:</b> The scope of the e-Filing activity is defined in the Tyler Statement of Work (SOW) and anticipates that e-Filing will be implemented in all CLJ courts over the next 10 months prior to the roll-out of supervision and case management.</li> </ul>	<ul style="list-style-type: none"> <li>✓ <b>RECOMMENDATION:</b> The project Steering Committee and AOC leadership should clearly articulate what e-Filing options exist for CLJ courts.</li> </ul>



## Project Management and Sponsorship

Assessment Area	Three-Month Rolling Risk Levels			Detailed Risk Assessment	
	Mar 2021	Feb 2021	Jan 2021	Risks and Findings	<i>bluecrane</i> Recommendations
				<p>Some courts are questioning the “mandate” for e-Filing. In particular, courts that will be implementing case management toward the latter periods of the five-year project are questioning the need for an “interim” solution.</p> <p>In March, the project Steering Committee, AOC leadership, the CLJ OCM Lead, and others on the team continued to better articulate what e-Filing options exist for CLJ courts and to work with court stakeholders to understand their concerns.</p>	
Scope: Supervision	No Risk Identified	No Risk Identified	Not Assessed	<p>✓ <b>FINDINGS:</b> The scope of the supervision activity is defined in the Tyler SOW. A fit-gap analysis was conducted in early January by AOC, the CUWG, and Tyler to validate requirements and to identify any requirements that require custom development by Tyler.</p> <p>Scope will be managed through the Requirements Traceability Matrix, system vendor contract deliverables, and the Project Change Management process.</p>	N/A



## Project Management and Sponsorship

Assessment Area	Three-Month Rolling Risk Levels			Detailed Risk Assessment	
	Mar 2021	Feb 2021	Jan 2021	Risks and Findings	bluecrane Recommendations
Scope: Case Management	No Risk Identified	No Risk Identified	Not Assessed	<ul style="list-style-type: none"> <li>✓ <b>FINDINGS:</b> The scope of the CLJ-CMS Project is established in the deliverables defined in the SOW in the Tyler contract. As noted in the preceding item, a fit-gap analysis was conducted in early January by AOC, the CUWG, and Tyler to validate requirements and to identify any requirements that require custom development by Tyler.</li> </ul>	N/A
Schedule: e-Filing	Risk <i>(risk increasing)</i>	Risk	Not Assessed	<ul style="list-style-type: none"> <li>✓ <b>RISK:</b> If corrections to the integrated project schedule from Tyler delay the final deliverable, the e-Filing sub-project timeline is at risk.</li> <li>✓ <b>FINDINGS:</b> The integrated project schedule from Tyler was due October 28, 2020. A draft was delivered on January 29, 2021, three months late. Deficiencies in the completeness of the schedule have been identified by AOC, and a new draft is now due on April 9, 2021.</li> </ul> <p>The integrated project schedule should be a schedule for each of the sub-projects (e-Filing, Supervision, and Case Management). In addition, it should include the work of AOC (OCM, technical, project management, court liaison, communications, testing, training, etc.) and the work of any partner organizations (e.g., a state agency that has to conduct integrations-related work, if any).</p>	<ul style="list-style-type: none"> <li>✓ <b>RECOMMENDATION:</b> AOC should collaborate with Tyler to correct inconsistencies in the integrated project schedule and complete this Tyler deliverable as soon as practical.</li> </ul>



## Project Management and Sponsorship

Assessment Area	Three-Month Rolling Risk Levels			Detailed Risk Assessment	
	Mar 2021	Feb 2021	Jan 2021	Risks and Findings	bluecrane Recommendations
				Work is moving ahead on e-Filing, despite the challenges with the integrated schedule deliverable.	
Schedule: Supervision	Risk <i>(risk increasing)</i>	Risk	Not Assessed	<ul style="list-style-type: none"> <li>✓ <b>RISK:</b> If corrections to the integrated project schedule from Tyler delay the final deliverable, the supervision sub-project timeline is at risk.</li> <li>✓ <b>FINDINGS:</b> The same schedule risk that is impacting e-Filing (see preceding item) is impacting the ability to finalize a schedule for supervision.</li> </ul> <p>In addition, answers to some of the open questions noted above under “Scope” may affect the contents of the schedule and the overall timeline. For example, if the number of tenets is expanded, that is additional work that needs to be accounted for in the schedule.</p>	<ul style="list-style-type: none"> <li>✓ <b>RECOMMENDATION:</b> AOC should collaborate with Tyler to correct inconsistencies in the integrated project schedule and complete this Tyler deliverable as soon as practical.</li> </ul>
Schedule: Case Management	Risk <i>(risk increasing)</i>	Risk	Not Assessed	<ul style="list-style-type: none"> <li>✓ <b>RISK:</b> If corrections to the integrated project schedule from Tyler delay the final deliverable, the case management system sub-project timeline is at risk.</li> <li>✓ <b>FINDINGS:</b> The same schedule risk that is impacting supervision (see preceding item) is impacting the ability to finalize a schedule for case management. Case management is a longer-term sub-project than e-Filing, for example, and can</li> </ul>	<ul style="list-style-type: none"> <li>✓ <b>RECOMMENDATION:</b> AOC should collaborate with Tyler to correct inconsistencies in the integrated project schedule and complete this Tyler deliverable as soon as practical.</li> </ul>



## Project Management and Sponsorship

Assessment Area	Three-Month Rolling Risk Levels			Detailed Risk Assessment	
	Mar 2021	Feb 2021	Jan 2021	Risks and Findings	<i>bluecrane</i> Recommendations
				probably “absorb” some early minor slippages. However, with all of the specificity of the SOW, there is no reason to delay completion of the schedule deliverable.	
<b>Governance</b>	<b>No Risk Identified</b>	<b>No Risk Identified</b>	<b>Not Assessed</b>	<p>✓ <b>FINDINGS:</b> The implementation of the CLJ-CMS project involves and impacts many stakeholders at the courts, AOC, and other state agencies. The complexity of the diverse stakeholder community is a challenge to the efficient and effective decision-making that will be needed to keep the project progressing successfully through the implementation.</p> <p>Project governance is defined in the Project Charter and is being executed effectively by the Project Leadership, Executive Sponsors, Steering Committee, and JISC.</p> <p>Business functionality governance is achieved through the Court User Workgroup (CUWG).</p>	N/A



## Project Management and Sponsorship

Assessment Area	Three-Month Rolling Risk Levels			Detailed Risk Assessment	
	Mar 2021	Feb 2021	Jan 2021	Risks and Findings	<i>bluecrane</i> Recommendations
Contract and Deliverables Management	<b>Risk (risk increasing)</b>	<b>No Risk Identified</b>	<b>Not Assessed</b>	<ul style="list-style-type: none"> <li>✓ <b>RISK:</b> If Tyler does not quickly “catch-up” on deliverables that are currently late as of March 2021, the CLJ-CMS timeline is at risk.</li> <li>✓ <b>FINDINGS:</b> The “process” of deliverables management by the AOC contracts staff is appropriate and sufficient. AOC staff are doing a diligent job of managing the Tyler contract, including addressing the current situation with late deliverables. In addition, the project team is reviewing the contents of deliverables for compliance and quality.</li> </ul> <p>However, notwithstanding the adequacy of the process, Tyler is consistently failing to meet deliverable due dates. The list of late deliverables quickly accumulated in March. While “start-up” challenges are not unusual and the remote work environment necessitated by the on-going COVID-19 crisis adds complexity to the effort, AOC recognizes that this is not a sustainable approach and must be addressed quickly.</p> <p>AOC took action on March 9 by communicating its dissatisfaction with the current situation and demanding that Tyler provide, among other things, (1) a realistic schedule that is mutually agreed to by both AOC and Tyler and (2) a proposal to address issues that led to the current slippages to</p>	<ul style="list-style-type: none"> <li>✓ <b>RECOMMENDATION:</b> AOC should continue its efforts to insist that Tyler address the issues with its consistently late delivery of required items and demonstrate compliance with their contract.</li> </ul>



## Project Management and Sponsorship

Assessment Area	Three-Month Rolling Risk Levels			Detailed Risk Assessment	
	Mar 2021	Feb 2021	Jan 2021	Risks and Findings	<i>bluecrane</i> Recommendations
				<p>help ensure the issues are not repeated going forward.</p> <p>AOC and Tyler met in mid-March to discuss the current issues and how best to move forward.</p> <p>On March 25, Tyler provided proposed dates for “catching-up” on delayed deliverables.</p> <p>In addition, Tyler has proposed more frequent “executive check-ins” going forward.</p>	





## Project Management and Sponsorship

Assessment Area	Three-Month Rolling Risk Levels			Detailed Risk Assessment	
	Mar 2021	Feb 2021	Jan 2021	Risks and Findings	<i>bluecrane</i> Recommendations
Program Staffing	Risk Being Addressed	Risk Being Addressed	Not Assessed	<ul style="list-style-type: none"> <li>✓ <b>RISK:</b> If the challenges to recruiting and hiring in the COVID-19 remote work environment delay critical hires for the project team, then AOC may need to fill some positions with contractors (at least temporarily) or risk delays in the project’s timeline.</li> <li>✓ <b>FINDINGS:</b> Staffing has been going well, despite the challenges posed by the current remote work environment. A “Test Lead” and a “Conversion Lead” started on March 1. Recruiting for a Deputy Project Manager and an “Integrations Lead” continues.</li> </ul>	<ul style="list-style-type: none"> <li>✓ <b>RECOMMENDATION:</b> Continue to manage through the recruiting and hiring challenges.</li> <li>✓ <b>RECOMMENDATION:</b> If specific positions (such as the “Integrations Lead”) continue to pose hurdles, escalate the need to utilize contractors for those positions (at least temporarily) to AOC management as early as practical—and before the staff openings jeopardize the project’s timeline.</li> </ul>
PMO Processes	No Risk Identified	No Risk Identified	Not Assessed	<ul style="list-style-type: none"> <li>✓ <b>FINDINGS:</b> The project team is establishing processes, consistent with industry “best practices,” to manage and track the project. Project communications are occurring at regularly scheduled project team, sponsor, and steering committee meetings.</li> </ul>	N/A



## People

Assessment Area	Three-Month Rolling Risk Levels			Detailed Risk Assessment	
	Mar 2021	Feb 2021	Jan 2021	Risks and Findings	<i>bluecrane</i> Recommendations
Stakeholder Engagement	No Risk Identified	No Risk Identified	Not Assessed	<p>✓ <b>FINDINGS:</b> The OCM and Communications Lead for the CLJ-CMS Project, CLJ-CMS Business Liaison, and AOC leadership team are doing an admirable and diligent job of reaching out to and engaging with the diverse CLJ stakeholder community.</p> <p>As noted under “Scope: e-Filing,” some courts are questioning the “mandate” for e-Filing. In particular, courts that will be implementing case management towards the latter periods of the five-year project are questioning the need for an “interim” solution. This situation creates challenges for Stakeholder Engagement but, for now, we view the risk as primarily related to the scope of the e-Filing effort.</p>	N/A
OCM: e-Filing	Risk <i>(risk increasing)</i>	Risk	Not Assessed	<p>✓ <b>RISK:</b> If some courts delay their implementation of e-Filing, then the original scope of the effort to implement e-Filing first in all CLJ-CMS courts may be in jeopardy.</p> <p><b>FINDINGS:</b> OCM is vital to addressing the scope risk related to e-Filing raised earlier in this report. OCM activities in this area are numerous, professional, and clear. Despite the admirable efforts, the court community is “pushing back” on:</p> <ul style="list-style-type: none"> <li>• Costs and mandatory aspects of fees</li> </ul>	<p>✓ <b>RECOMMENDATION:</b> Utilize the recently developed FAQ document to assist in communicating clearly and consistently with the court community.</p> <p>✓ <b>RECOMMENDATION:</b> The project Steering Committee and AOC leadership should clearly</p>



## People

Assessment Area	Three-Month Rolling Risk Levels			Detailed Risk Assessment	
	Mar 2021	Feb 2021	Jan 2021	Risks and Findings	<i>bluecrane</i> Recommendations
				<ul style="list-style-type: none"> <li>• Timing, especially among courts that may be five years away from the implementation of case management with Odyssey</li> <li>• Nature of the mandate for e-Filing (i.e., can a court “opt-out” or not?)</li> <li>• Other aspects of e-Filing</li> </ul>	articulate what e-Filing options exist for CLJ courts.
OCM: Supervision	No Risk Identified	No Risk Identified	Not Assessed	✓ <b>FINDINGS:</b> OCM activities in this area are numerous, professional, and clear.	N/A
OCM: Case Management	No Risk Identified	No Risk Identified	Not Assessed	✓ <b>FINDINGS:</b> OCM activities in this area are numerous, professional, and clear.	N/A
Communi-cations	No Risk Identified	No Risk Identified	Not Assessed	✓ <b>FINDINGS:</b> The OCM and Communications Lead for the CLJ-CMS Project, CLJ-CMS Business Liaison, and AOC leadership team are doing an admirable and diligent job of reaching out to and engaging with the diverse CLJ stakeholder community. Communications is an area of particular focus for the project Steering Committee.  The project team has conducted several webinars on e-Filing since mid-February.	N/A



## People

Assessment Area	Three-Month Rolling Risk Levels			Detailed Risk Assessment	
	Mar 2021	Feb 2021	Jan 2021	Risks and Findings	<i>bluecrane</i> Recommendations
Court Preparation and Training	No Risk Identified	No Risk Identified	Not Assessed	✓ <b>FINDINGS:</b> The CLJ-CMS Project has hired a “Training Lead” with previous AOC experience. The current focus is on the e-Filing pilot courts which will go live later this spring.	N/A



## Solution

Assessment Area	Three-Month Rolling Risk Levels			Detailed Risk Assessment	
	Mar 2021	Feb 2021	Jan 2021	Risks and Findings	<i>bluecrane</i> Recommendations
Business Process: e-Filing	No Risk Identified	No Risk Identified	Not Assessed	✓ <b>FINDINGS:</b> The business processes for e-Filing are minimal and relatively procedural in nature.	N/A
Business Process: Supervision	No Risk Identified	No Risk Identified	Not Assessed	✓ <b>FINDINGS:</b> The business processes for supervision are documented. The project is making any changes that are needed as a result of the CUWG's ongoing review of requirements.	N/A
Business Process: Case Management	No Risk Identified	No Risk Identified	Not Assessed	✓ <b>FINDINGS:</b> The business processes for case management are documented. The project is making any changes that are needed as a result of the CUWG's ongoing review of requirements.	N/A
Requirements, Design, and Configuration: e-Filing	No Risk Identified	No Risk Identified	Not Assessed	✓ <b>FINDINGS:</b> Requirements for e-Filing are minimal and relatively procedural in nature.	N/A



## Solution

Assessment Area	Three-Month Rolling Risk Levels			Detailed Risk Assessment	
	Mar 2021	Feb 2021	Jan 2021	Risks and Findings	<i>bluecrane</i> Recommendations
Requirements, Design, and Configuration: Supervision	No Risk Identified	No Risk Identified	Not Assessed	✓ <b>FINDINGS:</b> Supervision requirements are included in the requirements reviews being conducted over time by the CUWG.	N/A
Requirements, Design, and Configuration: Case Management	No Risk Identified	No Risk Identified	Not Assessed	<b>FINDINGS:</b> The CUWG conducted a fit-gap analysis with Tyler. Fifty-six requirements will need custom development by Tyler. The effort is estimated to be within the hours bid by Tyler for custom development work.	N/A
Integrations: e-Filing	No Risk Identified	No Risk Identified	Not Assessed	✓ <b>FINDINGS:</b> e-Filing requires a single integration across the agency and courts. Work is on-track using Biztalk 2020.	N/A



## Solution

Assessment Area	Three-Month Rolling Risk Levels			Detailed Risk Assessment	
	Mar 2021	Feb 2021	Jan 2021	Risks and Findings	<i>bluecrane</i> Recommendations
Integrations: Case Management	Risk	Risk	Not Assessed	<ul style="list-style-type: none"> <li>✓ <b>RISK:</b> If the integration approach for CLJ-CMS changes during the project, there will be a need for re-work of the integrations done prior to the change.</li> <li>✓ <b>FINDINGS:</b> On June 5, 2020, the AOC Architecture Review Board (ARB) made the decision to utilize a “middleware” approach to CLJ-CMS integrations rather than a “point-to-point” approach. Generally speaking, a middleware approach should be an efficient and effective approach since a point-to-point approach, while simple in nature, requires a software development effort for each integration and a middleware approach does not.</li> </ul> <p>The issue is complicated by the fact that AOC’s current middleware solution is a version of the product Biztalk that will be out-of-support <i>during the CLJ-CMS Project</i>. AOC is currently considering whether to move to a newer version of Biztalk or to move to a more modern platform such as Amazon Web Services (AWS) or Microsoft’s Azure solution. Moving to a new, modern middleware platform would require expertise that AOC does not currently possess.</p>	<ul style="list-style-type: none"> <li>✓ <b>RECOMMENDATION:</b> AOC should determine a single consistent approach for integrations on all aspects of the CLJ-CMS Project.</li> </ul>



## Solution

Assessment Area	Three-Month Rolling Risk Levels			Detailed Risk Assessment	
	Mar 2021	Feb 2021	Jan 2021	Risks and Findings	<i>bluecrane</i> Recommendations
Reports: Supervision	No Risk Identified	No Risk Identified	Not Assessed	✓ <b>FINDINGS:</b> Supervision reports are defined in the CLJ-CMS requirements.	N/A
Reports: Case Management	No Risk Identified	No Risk Identified	Not Assessed	✓ <b>FINDINGS:</b> Case management reports are defined in the CLJ-CMS requirements.	N/A
Testing: e-Filing	Not Started	Not Started	Not Assessed	✓ <b>FINDINGS:</b> The CLJ-CMS “Test Lead” started work on March 1.	N/A
Testing: Supervision	Not Started	Not Started	Not Assessed	✓ <b>FINDINGS:</b> The CLJ-CMS “Test Lead” started work on March 1.	N/A





## Solution

Assessment Area	Three-Month Rolling Risk Levels			Detailed Risk Assessment	
	Mar 2021	Feb 2021	Jan 2021	Risks and Findings	<i>bluecrane</i> Recommendations
Testing: Case Management	Not Started	Not Started	Not Assessed	✓ <b>FINDINGS:</b> The CLJ-CMS “Test Lead” started work on March 1.	N/A
Deployment: e-Filing	No Risk Identified	No Risk Identified	Not Assessed	✓ <b>FINDINGS:</b> After the pilot court implementations, e-Filing deployment will follow the same regional rollout plan as the one that will be utilized for supervision and case management.	N/A
Deployment: Supervision	No Risk Identified	No Risk Identified	Not Assessed	✓ <b>FINDINGS:</b> The CLJ-CMS Steering Committee has approved a regional rollout plan for supervision and case management.	N/A
Deployment: Case Management	No Risk Identified	No Risk Identified	Not Assessed	✓ <b>FINDINGS:</b> The CLJ-CMS Steering Committee has approved a regional rollout plan for supervision and case management.	N/A



Data					
Assessment Area	Three-Month Rolling Risk Levels			Detailed Risk Assessment	
	Mar 2021	Feb 2021	Jan 2021	Risks and Findings	<i>bluecrane</i> Recommendations
Data Preparation: Case Management	No Risk Identified	No Risk Identified	Not Assessed	✓ <b>FINDINGS:</b> Business Analysts (BAs) on the CLJ-CMS Project team are sending reports to courts on a fairly regular basis, with requests that the courts review their data and clean it up as they are able. When the project’s conversion begins, project technical staff will review data that is being converted and do additional clean-up at that time.	N/A
Data Conversion: Supervision	No Risk Identified	No Risk Identified	Not Assessed	✓ <b>FINDINGS:</b> Thirteen courts are currently on the CaseLoad Pro probation system, 39 courts have “homegrown” solutions, and some number of courts are on Tyler’s supervision solution already. The data conversion plan for supervision is to <b>not</b> convert data from non-Tyler solutions. For the courts using Tyler’s supervision solution currently, their data is already housed at Tyler and will be transferred to the new CLJ-CMS supervision solution.	N/A
Data Conversion: Case Management	Not Started	Not Started	Not Assessed	✓ <b>FINDINGS:</b> As noted above, data clean-up activities are underway, prior to conversion.	N/A



## Data

Assessment Area	Three-Month Rolling Risk Levels			Detailed Risk Assessment	
	Mar 2021	Feb 2021	Jan 2021	Risks and Findings	<i>bluecrane</i> Recommendations
Data Security	No Risk Identified	No Risk Identified	Not Assessed	✓ <b>FINDINGS:</b> The CLJ-CMS Project Technical Lead is meeting with AOC security staff on a monthly basis and validating the CLJ-CMS solution's security. In addition, he is currently working on a "Threat Model" which will be reviewed by AOC for approval prior to go-live.	N/A

## Infrastructure

Assessment Area	Three-Month Rolling Risk Levels			Detailed Risk Assessment	
	Mar 2021	Feb 2021	Jan 2021	Risks and Findings	<i>bluecrane</i> Recommendations
Infrastructure for Remote Work	Risk Being Addressed	Risk Being Addressed	Not Assessed	✓ <b>FINDINGS:</b> The CLJ-CMS Project has adapted well to the remote work environment implemented in response to the COVID-19 pandemic. While there are intermittent issues with bandwidth to/from certain geographic areas, the team has managed to move forward with project activities.	N/A



## Infrastructure

Assessment Area	Three-Month Rolling Risk Levels			Detailed Risk Assessment	
	Mar 2021	Feb 2021	Jan 2021	Risks and Findings	<i>bluecrane</i> Recommendations
Statewide Infrastructure	No Risk Identified	No Risk Identified	Not Assessed	<p>✓ <b>FINDINGS:</b> Because e-Filing and supervision will be delivered via a “Software-as-a-Service” (SaaS) approach, those applications will be accessible through an internet browser, requiring little technical infrastructure. The case management solution will require personal computers (desktops and laptops) and networking bandwidth adequate to support the application.</p>	N/A
Local Infrastructure	No Risk Identified	No Risk Identified	Not Assessed	<p>✓ <b>FINDINGS:</b> As noted above, the case management solution will require personal computers (desktops and laptops) and networking bandwidth adequate to support the application. The CLJ-CMS Project Manager has a list of technical infrastructure requirements that she will be sending out to the court community. In addition, she is starting conversations with AOC leadership regarding courts that have limited resources.</p>	N/A
Security Functionality	No Risk Identified	No Risk Identified	Not Assessed	<p>✓ <b>FINDINGS:</b> The security functionality of Odyssey has been approved previously by AOC for the Superior Court – Case Management System (SC-CMS).</p> <p>As noted above under Data Security, the CLJ-CMS Project Technical Lead is meeting with AOC security staff on a monthly basis and validating the</p>	N/A



## Infrastructure

Assessment Area	Three-Month Rolling Risk Levels			Detailed Risk Assessment	
	Mar 2021	Feb 2021	Jan 2021	Risks and Findings	bluecrane Recommendations
				CLJ-CMS solution's security. In addition, he is currently working on a "Threat Model" which will be reviewed by AOC for approval prior to go-live.	
Access	No Risk Identified	No Risk Identified	Not Assessed	<b>FINDINGS:</b> e-Filing and supervision access will be via browser. A computer will be required for access to the case management solution.	N/A
Environments	Risk	Risk	Not Assessed	<ul style="list-style-type: none"> <li>✓ <b>RISK:</b> If the number of tenets for supervision is expanded, then the additional work needs to be accounted for in the integrated schedule deliverable developed by Tyler.</li> <li>✓ <b>FINDINGS:</b> The CLJ-CMS Project is collaborating with Tyler on the number of "tenants" (essentially "system instances") that will be required to service courts in the state and setting up certain parameters in Odyssey related to supervision.</li> </ul>	<ul style="list-style-type: none"> <li>✓ <b>RECOMMENDATION:</b> AOC should work to quickly resolve the open issue of number of tenets required for supervision and have Tyler update the integrated schedule deliverable to reflect the decision.</li> </ul>
Post-Implementation Support	No Risk Identified	No Risk Identified	Not Assessed	<ul style="list-style-type: none"> <li>✓ <b>FINDINGS:</b> Based on "Lessons Learned" from the Superior Court – Case Management System (SC-CMS) Project, the CLJ-CMS Project staffing plan includes having four Business Analysts on-board before going live with pilot courts. These BAs will be able to develop expertise with the new solution that will be essential to post-go-live support.</li> </ul>	N/A



## Appendix: Overview of *bluecrane* Risk Assessment Approach

For this Independent QA Assessment, we have focused on 45 areas of assessment as depicted in Figure 1 earlier in this report. We have grouped the areas into our familiar categories of :

- **Project Management and Sponsorship**
- **People**
- **Solution**
- **Data**
- **Infrastructure**

In keeping with our dislike of “cookie cutter” approaches, we tailored the specific areas of assessment for relevance and importance to the CLJ-CMS Project *at this stage of its program lifecycle*.

Our risk ratings are summarized in Table 3 below.

**Table 3. *bluecrane*’s Risk Assessment Categorization**

<b>Assessed Risk Status</b>	<b>Meaning</b>
<b>No Risk Identified</b>	Program activities in the area assessed are not encountering any risks
<b>Risk Being Addressed</b>	A risk that is being adequately mitigated. The risk may be ongoing with the expectation it will remain blue for an extended period of time, or it may be sufficiently addressed so that it becomes green as the results of the corrective actions are realized
<b>Risk</b>	A risk that is significant enough to merit management attention but not one that is deemed a “show-stopper”
<b>High Risk</b>	A risk that project management must address or the entire planning effort is at risk of failure; these risks are “show-stoppers”



<b>Assessed Risk Status</b>	<b>Meaning</b>
<b>Not Started</b>	This particular activity has not yet started or is not yet assessed
<b>Completed or Not Applicable</b>	This particular item has been completed or has been deemed “not applicable” but remains a part of the assessment for traceability purposes

# **ITG Request 252 Appellate Courts Enterprise Content Management System (AC-ECMS)**

## **Project Update**

Martin Kravik, Project Manager

April 23, 2021



# Recent Activities

- The vendor staff resource primarily involved with automatic letter generation has left the company which severely impacts this aspect of the project. Development of letters still continues at a slower pace.
- Workflows are approaching completion. The current focus is on automating attorney admissions and discipline transactions from the WSBA.

# Recent Activities (cont.)

- The technical aspects of developing web-based access to court documents is very nearly done. A proof of concept is being conducted to evaluate the use of Microsoft Azure B2C (Business to Consumer) as an identity provider.
- Analysis of a document retention solution continues. Process discussions are on-going with the Washington State Archives.

# Active Project Risks

Total Project Risks			
Low Exposure	Medium Exposure	High Exposure	Closed
0	0	0	1

# Significant Risks Status

Risk	Probability/Impact	Mitigation
User authentication method for document website has not yet been determined.	Medium/High	AOC Architecture Review Board approved Microsoft Azure B2C.

# Next Steps

Event	Expected Completion
Continue building the web access to court documents solution	June 2021
Resolve project risks	April 2021
Finalize document retention analysis	June 2021
Finalize document workflow configuration	June 2021
Continue automatic letter generation	June 2021
Continue web access development	June 2021



# Deliverable Completion

## By June 30, 2021

- Document workflows, including the WSBA transactions, will likely be completed.
- Full completion of automatic letter generation is not likely. The current goal is to complete the most used letters. We are also looking at a “generic” letter concept.
- Development of a web-based system for accessing court documents is likely to be completed. Rolling it out to system users is likely to extend beyond the end of the biennium.



# Deliverable Completion

## By June 30, 2021

- The analysis and design of document retention processes may be complete.
- The OnBase version upgrade will not be completed due to its high impact on development activities and the need for upgraded MS Office software.



# Post AC-ECMS Project

- Any work beyond June 30<sup>th</sup> will either be completed by the AOC Appellate Applications and Operations team or conducted as another project. An example is the OnBase version upgrade.

# AC-ECMS Web Access

Kevin Ammons, PMO Manager

April 23, 2021



# Overview

- As part of AC-ECMS, two appellate court document access portals will be created for:
  - General public access
  - Registered case participants
- Neither site will offer access to confidential case types or sealed documents
- Processes and procedures will incorporate GR 15 and other legal guidance



# General Public Access Portal

- This site will provide access to documents for appeals of trial court case types 1 (criminal) and 2 (civil)
- The portal will not provide access to any trial court records
  - This means no clerk's papers, verbatim reports, exhibits, or administrative record will be available
- No registration will be required, and users must provide a complete appellate case number in order to receive any results

# Registered Case Participant Access Portal

- This site will provide access to appellate case documents based on registration by Bar #, or registered email address for self-represented litigants
- Users can only access cases where their Bar # or email address are validated as active case participants
- Users must provide a complete appellate case number in order to receive any results
- Represented litigants and others can use the public site or obtain documents from registered users
- This could significantly reduce manual processing of record requests at the appellate courts



# Next Steps

- AOC is working with the appellate courts to finalize requirements and develop an implementation timeline.
- Disclaimers for the access portals have been developed to provide users with information on what is provided on the portals and inform them of limitations on cases and documents available through the site.

# Draft Language for Appellate Court Document Portals

## Disclaimer for the Appellate Courts General Public Access Document Search

**Disclaimer:** The Washington State Appellate Courts Public Case Document Search is provided as a public service by the Washington State Administrative Office of the Courts (AOC) and the Appellate Courts.

Although every effort is made to ensure that the information contained is accurate, the AOC makes no representation or warranties that the information contained herein is accurate or correct, complete or in its most current form; AOC cannot guarantee the identity of any person whose name appears on these pages or documents and does not assume any liability resulting from the release or use of the information.

This website requires the user to provide a complete Appellate Case number and only allows searches for public case documents on a case-by-case look up. Public Appellate Case documents made available on this website may include documents filed by a party of the case and documents issued by the Appellate Court. It should also be noted that not all documents filed with the Appellate Courts are available on this website.

Not available on this website:

- Trial court record
- Sealed case documents
- Confidential and/or restricted case documents
- Documents from cases filed before January 1, 2020
- Documents that have not been accepted for filing by the court

Official court records can be obtained by contacting the offices of the Clerk of Court for the Appellate Court in which the document was filed.

General Rule (GR) 31 provides that parties "shall not include, and if present shall redact" social security numbers, financial account numbers and driver's license numbers. As indicated in the rule, the responsibility for redacting the personal identifiers rests solely with counsel and the parties. The Clerk's Office does not review documents for compliance with the rule.

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## Disclaimer for Appellate Courts Registered Participant Access to Case Documents

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Although every effort is made to ensure that the information contained is accurate, the AOC makes no representation or warranties that the information contained herein is accurate or correct, complete or in its most current form; AOC cannot guarantee the identity of any person whose name appears on these pages or documents and does not assume any liability resulting from the release or use of the information.

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# Draft Language for Appellate Court Document Portals

documents made available on this website may include documents filed by a party of the case and documents issued by the Appellate Court. It should also be noted that not all documents filed with the Appellate Courts are available on this website.

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## Terms and Conditions for Appellate Courts Registered Participant Access to Case Documents Account Creation

- 1. Warranties to Administrative Office of the Courts (AOC)**
  - a. By accepting the terms of this Agreement you warrant that you are at least eighteen (18) years of age and possess the legal authority to enter into this Agreement.
- 2. Lawful Use of Service Data and Information**
  - a. You may only use the service for lawful purposes, in compliance with all applicable laws, treaties, court rules, and administrative rules and policies.
  - b. You are responsible for ensuring that access and use of the service data and information by your customers, clients, or other third parties is conducted in a proper and legal manner.
  - c. You agree not to use the data accessed under this Agreement to create any automated database.
  - d. You, or any officer, employee, or agent of yours, shall not furnish in any form, to any person, corporation, partnership, association, or organization, any individual name, address or other identifying information provided by the AOC pursuant to this Agreement for the purpose of making contact with persons named, or otherwise identified, for commercial solicitation purposes. [[RCW 42.56.070\(9\)](#)].
- 3. Grant of Use**
  - a. You shall not gain any proprietary right to, nor interest in, any information and data provided by the service. Any rights or interest, or any portion thereof, derived by you under this Agreement are exclusive to you, or your company, and may not be transferred, assigned, or sold for any purpose whatsoever to any person, corporation, partnership, association, or organization of any kind.



# Seattle Municipal Court Integration to the Enterprise Data Repository

## Project Update

Tammy Anderson  
EDR Program Manager

April 23, 2021



# On-Boarding Support

- The AOC EDR team is providing information to the SMC project team for both the technical and business aspects of SMC responsibilities for connecting to the EDR.
- The AOC EDR team is providing consultative assistance:
  - Conducting work sessions with SMC business team for mapping the JIS Data Standard elements and reference data as they configure their new CMS.
  - Assisting the SMC technical team with their ability to connect to the EDR web service technology.
  - Assisting SMC with prioritization of their work efforts.





# On-Boarding Support (cont.)

- AOC EDR Teams have established weekly work sessions in order to assist bringing new staff up to speed.
- Continue to work with DOL to identify any new data exchanges and possibly new data elements currently not captured in the EDR Data Standards.



# Impacts to Schedule

- AOC on-boarding activities are dependent upon and impacted by SMC project schedule delays



# Next Steps

- Continued collaboration with both SMC and DOL to assess data exchange gaps
- Business and technical work sessions as necessary for SMC

# **ITG Request 242 - Washington State Patrol (WSP) System Modernization**

Kevin Ammons, PMO Manager  
Tammy Anderson, EDR Program Manager

April 23, 2021

# Overview

- WSP is modernizing their Washington State Identification System (WASIS) criminal history system to:
  - process more records automatically
  - make several changes to improve functionality
  - make many process changes
- WSP will also transition to using the Transaction Control Number (TCN) as the primary number to track fingerprinting events to criminal cases.
- WSP's planned go-live date is May 11, 2021.



# Recent Activities

- AOC made changes to Odyssey, SCOMIS, DISCIS, Case Replication (SCDX), JABS, and the Electronic Ticketing Process
  - These changes allow AOC systems to accept either PCN or TCN
  - All changes were completed in February



# WSP Data Exchange

- AOC manages the WSP Disposition Data Exchange and has made the requested changes to work with their new system. The changes provide additional functionality:
  - Ability to send either PCN or TCN
  - Added new data elements to improve their ability to report
  - Improved performance to send more records
- Implementation of the new data exchange will be ready when the new WSP system is confirmed and ready to receive disposition data.



**JISC DATA DISSEMINATION COMMITTEE**  
**Friday, April 23, 2021, 8:00 a.m. – 9:55 a.m.**  
**Zoom Teleconference**  
**URL: provided via invite**

**AGENDA**

<b>Call to Order</b>	Judge John Hart	Agenda Items with documents are indicated with an *
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**ACTION ITEMS**

<b>1. December 4, 2020, Meeting Minutes</b> Action: Motion to approve the minutes	Judge Hart - All	*
<b>2. Request for Modification to WSIPP Data Sharing Agreement</b>	Mr. Kevin Cottingham Ms. Stephanie Lee	*
<b>3. Update Regarding Data Dissemination Request Fees</b>	Mr. Kevin Cottingham	*
<b>4. Juvenile Judgments in Public Case Search</b>	Ms. Hayley Keithahn-Tresenriter	*
<b>5. Other Business</b>	Judge Hart	





**Board for Judicial Administration (BJA) Meeting**  
**Friday, February 19, 2021, 9:00 a.m. – 12:00 p.m.**  
Videoconference

**MEETING MINUTES**

**BJA Members Present:**

Chief Justice Steven González  
Judge Greg Gonzales, Member Chair  
Judge Tam Bui  
Judge David Estudillo  
Judge Michelle Gehlsen  
Judge Rebecca Glasgow  
Judge Dan Johnson  
Judge David Kurtz  
Judge Mary Logan  
Judge David Mann  
Judge Bradley Maxa  
Terra Nevitt  
Judge Rebecca Pennell  
Judge Judith Ramseyer  
Judge Rebecca Robertson  
Dawn Marie Rubio  
Kyle Sciuchetti  
Judge Michael Scott  
Judge Charles Short  
Justice Debra Stephens

**Guests Present:**

Jim Bamberger  
Barbara Carr  
Timothy Fitzgerald  
Chris Gaddis  
Patti Kohler  
Robert Mead  
Judge Kevin Ringus  
Tristen Worthen

**Administrative Office of the Courts  
(AOC) Staff Present:**

Crissy Anderson  
Judith Anderson  
Jeanne Englert  
Heidi Green  
Penny Larsen  
Dirk Marler  
Ramsey Radwan  
Caroline Tawes

Call to Order

Chief Justice González called the meeting to order at 9:02 a.m.

Presentation: OCLA Overview

Jim Bamberger provided an overview of the Office of Civil Legal Aid (OCLA) and civil legal aid in general. He discussed the programs and services of OCLA, focusing on the COVID-19 civil legal aid program and funding proposals.

Superior Court Judges' Association (SCJA ) Legislative Support Request Letter

The SCJA worked with several justice system partner organizations to create a draft letter to send to legislators regarding the hundreds of bills that will affect the court system this year. Practical implementation of these bills is challenging, and there is

concern about the compounding effect of the bills, especially cost and workload effects. The letter is a draft and open to comments and edits.

Some members would like to shift the message to recognize the work the courts have accomplished and how courts have stayed open during the public health emergency, and focus on partnering in policy goals with the legislature.

The letter will be edited and reviewed by, Chief Justice González, Justice Stephens, Judge Mann, Judge Ramseyer, Judge Gonzales, Dawn Marie Rubio, and Ramsey Radwan.

**It was moved by Judge Gonzales and seconded by Chief Justice González to approve sending a revised letter to the Legislature. The motion carried unanimously.**

#### Task Force Reports

**Court Recovery Task Force (CRTF):** The meeting materials contain a summary of the CRTF's goals and work. The information is also on the CRTF website. Several surveys have been distributed.

**Court Security Task Force:** The Trial Court Security Improvement budget proposal was withdrawn previously but after the District and Municipal Court Judges' Association (DMCJA) met with legislators the budget proposal was reconsidered. A budget proposal of \$780,000 will be resubmitted.

**It was moved by Judge Gehlsen and seconded by Judge Robertson to resubmit the Trial Court Security Improvement budget proposal. The motion carried unanimously.**

#### Standing Committee Reports

**Budget and Funding Committee:** Through February 10, 2021, general fund collections since the November 2020 forecast are \$600 million greater than estimated. There will be another forecast in March 2021. Instructions for the 2022 supplemental budget request will be available at the next BJA meeting. The Committee is following legislation with budget implications. Over \$11 million in AOC CARES funding has been distributed courts and clerk offices statewide

**Court Education Committee (CEC):** The 2021 Judicial College was held virtually and was very successful. Judge Gonzales recognized the deans of the college and AOC staff. A new Learning Management Systems Request for Proposals is anticipated to be purchased by June, 2021. A revised online bailiff program will be up and running by July 2021. The DMCJA held a webinar on *State v. Gelin* with 200 participants. Forty-

five to 50 administrators have participated in Institute for Court Managers (ICM) training. A CEC summary was included in the meeting materials.

**Legislative Committee (LC):** Office of Judicial and Legislative Relations Associate Director Dory Nicpon left AOC in December 2020. Judge Ringus thanked Dawn Marie Rubio, AOC staff Sondra Hahn, and contract lobbyist Devon Connor-Green for their work on legislation. Over 1,100 bills and substitute bills have been introduced in the legislature, and approximately 400 will impact the judiciary. Information was included in the meeting materials.

**Policy and Planning Committee (PPC):** The PPC is focusing on an adequate funding survey that will be sent to presiding judges and administrators. Results will be presented at the June BJA meeting.

#### Presentation: Innovating Justice Awards

The Innovating Justice Awards were presented to Judge Willie Gregory (presented by Judge Eisenberg) and Vanessa Engquist (presented by Judge Michels).

#### BJA Member Co-Chair for 2021–23

**It was moved by Judge Gonzales and seconded by Judge Logan to approve the BJA Chairs' recommendation for DMCJA member chair Judge Tam Bui. The motion carried unanimously.**

#### Judicial Leadership Summit

The members agreed to hold another Judicial Summit, likely using a virtual format. The Summit is tentatively scheduled for the June BJA meeting, although dates available in September may also be considered. The topic/focus areas for the summit were court operations; court security; engagement with legislative leadership and how the courts and the legislature can improve collaboration; and adequate and consistent court funding throughout the state.

**It was moved by Chief Justice González and seconded by Judge Gehlsen to approve these four topic/focus areas for the next Leadership Summit. The motion carried unanimously.**

#### November 20, 2020 Meeting Minutes

**It was moved by Judge Scott and seconded by Judge Ramseyer to approve the November 20, 2020, BJA meeting minutes. The motion carried unanimously.**

### Information Sharing

The next bar exam will take place virtually on February 22, 2021. The summer bar exam will not be virtual. A question and answer session was held to mitigate concerns about the February exam, and those questions and answers are posted on the Washington State Bar Association (WSBA) website.

The WSBA Board of Governors' long-range planning committee will discuss the WSBA structure in the next five to ten years. There is an initiative for the WSBA to increase well-being programs for members.

The notice for the Office of Judicial and Legislative Relations Associate Director position will be posted today and will remain open through the end of March 2021. The position will be advertised locally and nationally.

Supreme Court Clerk Susan Carlson will retire at the end of June 2021. Deputy Clerk Erin Lennon has been selected as the new Clerk, and the Supreme Court will advertise the Deputy Clerk position.

Court of Appeals Division I Court Administrator/Clerk Richard Johnson will retire at the end of March 2021. Lea Ennis, Director of King County Juvenile Court, has been hired as the new Court Administrator/Clerk.

The Supreme Court has approved updates to emergency court operations orders and has re-suspended RAP 18.8b. The updated orders will be distributed statewide.

The District and Municipal Court Management Association (DMCMA) will issue a racial support proclamation in April. They are working on their spring program that will be held a couple of hours each day for a week, beginning May 14.

A work group will be convened with members from the SCJA, DMCJA, Washington Defender Association, and the Washington Association of Prosecuting Attorneys to look at standard orders or best practices around the *Gelinas* case.

Renee Townsley, Court of Appeals Division III Clerk/Administrator, is retiring.

The Court of Appeals Division I will begin next week with judges on the bench wearing masks and all other participants appearing remotely.

King County is moving to remote jury trials.

There is a webinar today on the Courts of Limited Jurisdiction Case Management System eFiling implementation. The WSBA will hold training for prospective pro tempore judges on February 26, March 5, and March 12. There were 130 participants in a February training.

There will be a roundtable discussion on *State v. Gelinis* and CR 3.4 on March 5. There was a webinar on February 9 on *Gelinis* that was recorded. Judge Gehlsen has the PowerPoint that was used in the webinar.

Presiding judges were encouraged to join the Friday morning meetings with the Chief Justice.

There is a hearing on HB 1320 today in the House Appropriations Committee.

Other

There being no further business, the meeting was adjourned at 11:30 a.m.

**Recap of Motions from the February 19, 2021 Meeting**

<b>Motion Summary</b>	<b>Status</b>
Approve sending a revised letter to the Legislature.	Passed
Resubmit the Trial Court Security Improvement budget proposal.	Passed
Approve the BJA Chairs' recommendation for DMCJA member chair Judge Tam Bui.	Passed
Approve the four topic/focus areas for the next Leadership Summit.	Passed
Approve the November 20, 2020, BJA meeting minutes.	Passed

**Action Items from the February 19, 2021 Meeting**

<b>Action Item</b>	<b>Status</b>
Instructions for the 2022 supplemental budget request will be available at the next BJA meeting	
The Policy and Planning Committee is focusing on an adequate funding survey that will be sent to presiding judges and administrators. Results will be presented at the June BJA meeting	
<u>November 20, 2020, BJA Meeting Minutes</u> <ul style="list-style-type: none"> <li>• Post the minutes online.</li> <li>• Send minutes to the Supreme Court for inclusion in the En Banc meeting materials.</li> </ul>	Done Done



# IT Governance

*"IT Governance is the framework by which  
IT investment decisions are made, communicated and overseen"*

# Summary of Changes Since Last Report

<b>New Requests:</b>	1317 - BizTalk 2020 Upgrade 1318 - Business Object Upgrade
<b>Endorsements:</b>	None
<b>Analysis</b>	
<b>Completed:</b>	None
<b>Endorsement</b>	
<b>Confirmations:</b>	None
<b>CLUG Decision:</b>	None
<b>Authorized:</b>	None
<b>In Progress:</b>	283 - Modify Odyssey Supervision Probation Category to Support Non-Criminal Cases 286 - Statewide Reporting 1296 - Superior Court Text Messaging and E-mail Notifications
<b>Completed:</b>	232 - Data Quality for Statewide Criminal Data
<b>Closed:</b>	292 - Add email address to the CIV screen in JIS (Endorsement Declined)

# JISC ITG Strategic Priorities

JISC Priorities				
Priority	ITG#	Request Name	Status	Requesting CLUG
1	102	Courts of Limited Jurisdiction Case Management System	In Progress	CLJ
2	252	Appellate Electronic Court Records	In Progress	Appellate
3	27	Seattle Municipal Court CMS to EDR Data Exchange	In Progress	CLJ
4	270	Allow MH-JDAT data accessed through BIT from Data Warehouse	Authorized	Superior



# ITG Status Year in Review

JISC Authorized

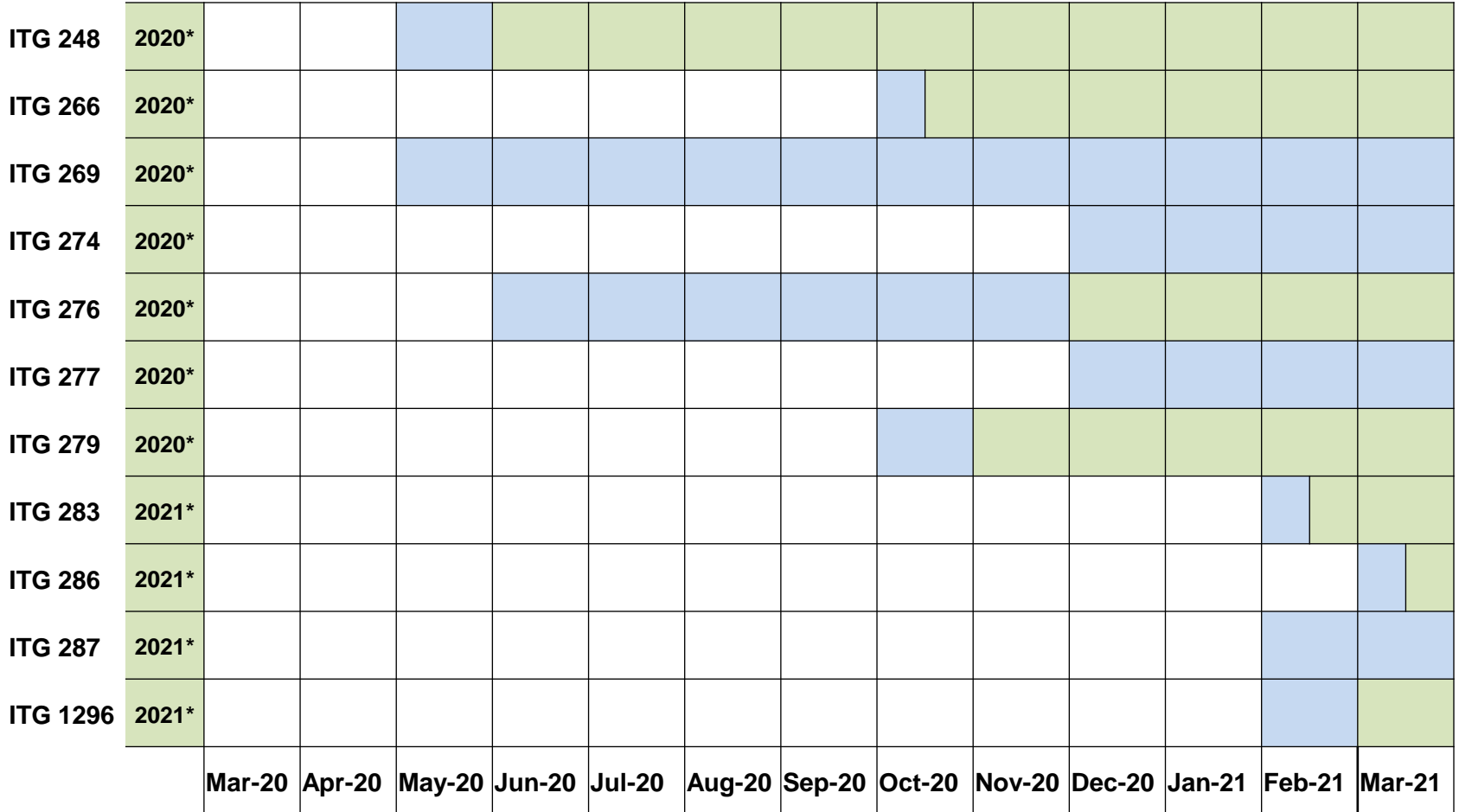
ITG 102	2011*													
ITG 252	2018*													
ITG 27	2011*													
ITG 270	2020*													
		Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21	Mar-21

Authorized
  In Progress
  Completed
  Withdrawn or Closed

\* Year ITG authorized

# ITG Status Year in Review

AOC Admin/CIO Authorized



\* Year ITG authorized

# Current ITG Priorities by CLUG

Priority	ITG #	Request Name	Status	Approving Authority	Importance
<b>Appellate CLUG</b>					
1	252	Appellate Electronic Court Records	In Progress	JISC	Unspecified
<b>Superior CLUG</b>					
1	248	Washington State Juvenile Court Assessment	In Progress	Administrator	High
2	270	Allow MH-JDAT data to be accessed through BIT from the Data Warehouse	Authorized	JISC	High
3	283	Modify Odyssey Supervision Probation Category to Support Non-Criminal Cases	In-Progress	Administrator	Medium
4	274	EFC Extended Foster Care-Dependency - Modify Required Party of PAR Parent	Authorized	CIO	Medium
5	277	TRU Truancy - Modify Required Party of PAR Parent	Authorized	CIO	Unspecified
6	269	Installation of Clerks Edition for Franklin County Superior Court Clerks Office	Authorized	CIO	High
<b>Courts of Limited Jurisdiction CLUG</b>					
1	102	Courts of Limited Jurisdiction Case Management System	In Progress	JISC	High
2	27	Seattle Municipal Court CMS to EDR Data Exchange	In Progress	JISC	High

Authorized
  In Progress
  Completed
  Withdrawn or Closed

# ITG Request Progress

Awaiting Endorsement	Awaiting Analysis	Awaiting Endorsement Confirmation	Awaiting CLUG Recommendation	Awaiting Authorization	Awaiting Scheduling
None	<p><b>220**</b> Supplemental Race/Ethnicity Request</p> <p><b>265*</b> Kitsap District Court CMS to EDR Data Exchange</p> <p><b>275*</b> Odyssey to EDR</p> <p><b>284*</b> Criminal cases with HNO and DVP case types allow DV Y/N</p> <p><b>1297*</b> Self-Represented Litigants (SRL) Access to SC &amp; CLJ Courts</p> <p><b>1306*</b> RightNow Replacement</p> <p><b>1307*</b> Law Data Project</p> <p><b>1308</b> Integrated eFiling for Odyssey DMS Superior Courts</p> <p><b>1309*</b> SQL Server Upgrade 2019 Upgrade</p> <p><b>1313*</b> Supreme Court Opinion Routing/Tracking System</p> <p><b>1317</b> BizTalk 2020 Upgrade</p> <p><b>1318</b> Business Object Upgrade</p>	<p><b>241**</b> JIS Person Business Indicator</p>	<p><b>256</b> Spokane Municipal Court CMS to EDR Data Exchange</p>	None	<p><b>269</b> Installation Of Clerks Edition For Franklin County Superior Court Clerks Office</p> <p><b>270</b> Allow MH-JDAT/MAISI data to be accessed through BIT from the Data Warehouse</p> <p><b>274</b> EFC Extended Foster Care-Dependency - Modify Required Party of PAR Parent</p> <p><b>277</b> TRU Truancy - Modify Required Party of PAR Parent</p> <p><b>287</b> OnBase Product Upgrade to v20.3</p>

\* Analysis Underway    \*\* On Hold

# ITG Request Progress

Awaiting Endorsement	Awaiting Analysis	Awaiting Endorsement Confirmation	Awaiting CLUG Recommendation	Awaiting Authorization	Awaiting Scheduling
None	<p><b>220**</b> Supplemental Race/Ethnicity Request</p> <p><b>232**</b> DQ for Statewide Criminal Data</p> <p><b>265*</b> Kitsap District Court CMS to EDR Data Exchange</p> <p><b>275*</b> Odyssey to EDR</p> <p><b>284*</b> Criminal cases with HNO and DVP case types allow DV Y/N</p> <p><b>1297*</b> Self-Represented Litigants (SRL) Access to SC &amp; CLJ Courts</p> <p><b>1306*</b> RightNow Replacement</p> <p><b>1307*</b> Law Data Project</p> <p><b>1308</b> Integrated eFiling for Odyssey DMS Superior Courts</p> <p><b>1309*</b> SQL Server Upgrade 2019 Upgrade</p> <p><b>1313*</b> Supreme Court Opinion Routing/Tracking System</p>	<p><b>241**</b> JIS Person Business Indicator</p> <p><b>292</b> Add email address to the CIV screen in JIS</p>	<p><b>256</b> Spokane Municipal Court CMS to EDR Data Exchange</p>	<p><b>286</b> Statewide Reporting</p>	<p><b>269</b> Installation Of Clerks Edition For Franklin County Superior Court Clerks Office</p> <p><b>270</b> Allow MH-JDAT/MAISI data to be accessed through BIT from the Data Warehouse</p> <p><b>274</b> EFC Extended Foster Care-Dependency - Modify Required Party of PAR Parent</p> <p><b>277</b> TRU Truancy - Modify Required Party of PAR Parent</p> <p><b>283</b> Modify Odyssey Supervision Probation Category to Support Non-Criminal Cases</p> <p><b>287</b> OnBase Product Upgrade to v20.3</p> <p><b>1296</b> Superior Court Text Messaging and E-mail Notifications</p>