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## **PROJECT MANAGER UPDATE**

As the project team, our pilot court partners, and our vendor are getting into the nitty gritty of breathing life into the new case management system, I want to take this opportunity to provide an overview of how projects are developed and delivered. Projects have start and end dates and are intended to bring about a specific solution for a specific problem. While most of us have our own understanding of what is involved when working on a project, I want to lay a solid foundation for how information technology projects are usually delivered.

The Project Management Institute (PMI®) breaks projects into five phases: Initiation, Planning, Execution, Controlling, and Closing. These phases are usually depicted in order, one after another, with hard lines denoting the transition between phases. The reality for IT projects is that there is often overlap between each of these phases, and as with anything in life, the lines between when one phase ends and another begins are never as clear as they're pictured. The CLJ-CMS project is squarely in the Execution Phase, but what does that mean, and how did we get here?

All projects start with Initiation. This is the formal start of the project. For CLJ-CMS, this happened way back in 2014 when district and municipal courts acknowledged it was time for a new case management system to meet their business needs, stakeholders who could help steer the project were identified, requirements for a new system were starting to be gathered, and a vendor was selected.

Things get a bit more interesting with Planning. Planning is front-loaded as much as possible (we try to anticipate what may be needed), but technology moves fast, and plans built in 2018 are unlikely to carry forward without modification through the projected end of the project in 2026. That doesn't mean that we do not carefully plan, just that we shouldn't be tied to the original plan wholesale. Modern project management requires the ability to change course, modify plans as needed, and adjust to changing circumstances. Agility is key here, and being willing to course correct when the landscape changes means that the project can still be successful, even if it's not following the previously conceived plan to a T.

Which brings us to Execution - where the plan is worked - this means that all the tasks that were identified as necessary to bring a new system to life are completed. In IT projects, we



often call this “Implementation”. CLJ-CMS has been “executing” since 2020, and during that time the team has focused on deploying and configuring the system to support 1500+ individual requirements, documenting over 300 business processes, and converting millions of rows of data from legacy systems into Enterprise Justice and Enterprise Supervision. Our vendor, Tyler Technologies, has also delivered the first round of modifications required for Pilot Go Live, and those are being deployed, configured, and tested. The Execution phase of the project includes a pilot. Running a pilot effort allows the project team to refine how the new system and tools can be best used (or modified if necessary) to truly meet the needs of our CLJs before we bring that system to all 300 courts by 2026.

As we work intensively with our pilot courts, we’ll continue to share with you how we are executing the plan, or adapting as necessary, to bring you the new system which will help you serve your communities. As always, if you have any questions, please reach out to [CLJCMSProject@courts.wa.gov](mailto:CLJCMSProject@courts.wa.gov).

**Garret Tanner**  
**Project Manager**

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## **PREPARING FOR PROJECT IMPLEMENTATION**

About six months before a go-live event, the project team begins focused work with the courts that are next in an active rollout group. A number of things need to be done as we collectively move toward a future go-live date, but one of the most crucial elements we work on is gathering the court and probation local configuration items needed to finish setting up the programs.

From day one, the goal of the CLJ-CMS Court User Work Group (CUWG) has been to standardize court processes as much as possible in the new programs, but there are still some things that require local configurations. For example, one court may require the ability to do vehicle impound hearings, while another has no need for it – these types of specific business needs can vary by court due to a variety of factors. In order to gather the information needed from each court, the business team has developed local configuration questionnaires, similar to the ones supplied to each court for gathering their eFile & Serve local set up. If your court has documented your processes as recommended in prior newsletter articles (you can find previous newsletters [here](#)), this process should be fairly easy to complete. However, there are some things that may not be documented yet in your processes, so we’ve created a list of areas you may want to focus on to make completing your set-up questionnaire a smooth experience:

**Court Calendars** – While it is very important to have your actual calendar documented, there are other processes and details that you should consider documenting:

- Do you have more than one location for hearings (e.g. different courtrooms, separate buildings)?
- If you have multiple calendars, what is your process to determine how hearings are scheduled?
- What courtroom resources do you have? This should include staff, recording systems, video equipment, or any other equipment you may want to assign to a particular calendar or hearing.
- How do public defenders get assigned? Is it randomly, evenly distributed, by name or type of charge?

**Collections Process** – It may seem like a standard process, but each court has some distinct differences in some of the details, like:

- How many days delinquent determines a balance is “past due”?
- How many notices does a party get before an amount is assigned to collection?
- Are there any dispositions or conditions that prevent a case from going to collection?

**Probation** – There are generally different processes for Supervised Probation vs. Bench Probation, so make sure each are documented, including:

- If you have more than one person doing Supervised and/or Bench Probation how are the tasks or caseloads divided?
- For supervised probation, do you utilize case plans currently? For example, are you setting goals/objectives and regular review dates for each defendant? If yes, are there standards for those or are they based on charges or the individual’s assessments and compliance needs?

**Position Specific Functions** - or “Who does what?”:

- Which roles will need to be able to receipt (e.g. which position needs a “till”)?
- Are there specific computers that will be considered a cashiering station?

**Other items to document:**

- Which local forms does the court utilize? More specifically, which forms are you using that are not available in or are completely different from statewide pattern forms? Identifying and documenting those is important.
- Does your court have physical files? If yes, are there different locations where these are kept that you will want to document within the case management system?
- Do cases get assigned to a specific judicial officer? If yes, what criteria determines which judicial officer is assigned to specific cases?

Having these details documented will help your court more easily complete the set-up questionnaires when it is your turn to start this implementation process. We recommend that you begin creating this documentation at least six months before the project team begins its focused work with you. Per the implementation timeline found at our [website](#),

if you are in Phase I with a go-live date of September 2023, we recommend you have your processes documented by February 2023. If you have any questions on the guidance shared above, please contact us at [CLJCMSProject@courts.wa.gov](mailto:CLJCMSProject@courts.wa.gov).

**Angie Autry**  
**Court Business Supervisor**

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## **GETTING TO KNOW PROJECT STAFF**



### **Saint Inman**

I have been working at AOC for over four years (since December 2017). I started as a tester on the SC-CMS Project. A year ago I switched over to the CLJ-CMS Project as the test lead. I graduated from Central Washington University with a B.S. in Biology. I then earned a Professional Science Master's Degree in molecular biosciences from Washington State University. Before joining the agency I had over 10 years of IT experience in the private sector working at LabCorp and Quest Diagnostics. When not working, I enjoy spending time with friends and family. Some of my favorite activities include golfing, grilling, gardening, hiking, kayaking, and basically being outside!

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## **DO YOU HAVE QUESTIONS TO ASK OR FEEDBACK TO PROVIDE?**

Questions, comments, and feedback related to this newsletter and the CLJ-CMS Project are welcomed at [CLJCMSProject@courts.wa.gov](mailto:CLJCMSProject@courts.wa.gov).