WASHINGTON
COURTS

June 24, 2016

TO: JISC Data Dissemination Committee

FROM: Stephanie Happold, AOC Data Dissemination Administrator

RE: Odyssey Portal Issues

BACKGROUND:

During its last meeting, the JISC Data Dissemination Committee directed DDA Happold to provide the Committee with a list of known Odyssey Portal issues. At the suggestion of some DDC members, DDA Happold contacted three County Clerk's Offices that have implemented Odyssey and asked for their input. Below is a summary of the issues known to DDA Happold and also conveyed by the County Clerk's Offices. Any solution or ongoing work for each issue is provided in underlined italics.

REGISTRATION & SECURITY ROLE ISSUES:

Single email registration issues. Currently, Odyssey Portal users requiring access to more than one county's documents must register with a separate email address in each county. This is a problem for all Portal customers. Some counties are having to issue refunds to customers who cannot comply. *Tyler Technologies will soon begin development on a Portal modification which will allow users to register with one email address for access to documents in multiple counties. Each County Clerk will remain responsible for approving access to her/his county's documents in Portal. AOC anticipates implementing this development in mid-2017.*

Security is based on Base Case Types. Cannot fine-tune certain roles, such as the Juvenile Justice and Care Agency role, to fit the needs of the users.

GAL Override. The GAL of record override works like the Attorney of Record permissions override. However, some Clerks have commented that it is time-consuming.

Focus on Security Roles & Case Types education prior to rollout. Some early adopters did not fully understand the importance of case types and security role access levels prior to the Odyssey implementation. Clerks recommend AOC focus on educating Clerk staff and other users regarding the different security roles and confidential case types. *Currently what is done: at the beginning of every implementation period, members from the SC-CMS project hold an Odyssey Security Overview and Training for*

site coordinators. This covers both Odyssey and Odyssey Portal security. SC-CMS Business Analysts also do some case type education during Business Process Reviews.

Registration issues causing additional work and tracking for Clerk's Offices.

- **a.** Users are not selecting and/or requesting Portal roles when they are requesting access – need clearer directions.
- **b.** Some requestors are not receiving the registration emails.
- **c.** Many users who receive the registration emails miss the 48 hour registration window, which is not long enough. *Tyler Technologies is working to fix this issue and AOC is waiting for the build.*

Limitations on linking legal assistants to more than one bar number. Odyssey Portal can only link one legal assistant per attorney bar number. Users would like to see this expanded so a legal assistant can view documents tied to all attorneys they support.

Court Lobby and Registered Users cannot see public Juvenile Offender information in Odyssey Portal. One office reported that Odyssey Portal court lobby access and registered public users cannot view Juvenile Offender information. However, other offices did not have this issue. *SC-CMS project members confirmed that court lobby user and registered public user accounts have access to juvenile offender cases as long as they have not been made confidential or sealed.*

Need for new role for certain parties to view statutorily confidential case documents. Examples: Mother of child victim, pro se users. Currently, there is no Odyssey Portal role to allow these parties access to statutorily confidential case documentation. Now that courts are moving to paperless systems, it is challenging to provide the documentation these individuals need to review without a proper access level in Portal. *New roles can be created, but the challenge is how their access will be submitted/managed. This is a continuing discussion.*

Probate AORs cannot view confidential documents. Some attorneys that were listed correctly in Odyssey did not replicate over to Odyssey Portal. Clerk had to unlink the attorney from the case and remove them from the events information and then relink back. The relinking worked.

TECHNICAL AND APPLICATION ISSUES:

Calendaring functions and search for hearings using attorney bar number unreliable. Counties are unsure if bar number information is properly tied to all cases. This applies to cases and hearings before and after Odyssey implementation.

- **a.** Some Attorneys do not see hearings that they know are calendared;

b. Other Attorneys cannot view any of the hearing or calendaring information prior to go live date. *SC-CMS Project is reviewing this issue*.

Financial screen is lacking important information. Because financial information is not being replicated, and the displayed Odyssey information is lacking, prosecuting attorneys and some state agencies are having to supplement information from other sources. *Tyler Technologies is working on a project that will make more financial details available in the Odyssey Portal.*

Attorneys are frustrated with document download & printing functionalities. Attorneys miss capabilities they had with Liberty where they could select all and then download in order. Now each file must be opened individually and documents are not exporting in a logical order; exports are coming through alphabetically, or by file size; not on the order they are selected by the user. *Tyler Technologies expects to fix this in January 2017, but this remains a problem until then. However, Odyssey Portal was not created to be a document management system for Portal users.*

Interface issues. The search result screen is not intuitive. Users cannot click on text to move to the next screen; instead they have to click on small gray arrows which are hard to see.

Search screen guidance. The home screen for Portal searches does not provide information or guidance on how to perform a 'wildcard' search. Directions are buried in the User Guide and should either be stated or clearly linked on the Portal Search home screen. *User Guide is being reviewed to make the information more prominent.*

VIEW ISSUES:

Attorney of Record (AOR) information not completely displaying for all cases. AOR only able to see post conversion docs and events; cannot see anything prior to Odyssey implementation. *The majority of this issue is related to the way the attorney was added to the case in SCOMIS. If the attorney was not added to the case in a way that identified which party the attorney was tied to, it affected how it was converted into Odyssey.*

Confidential addresses and DOB. Confidential dates of birth (DOB) and addresses can be viewable by the public in publically accessible cases. All DOBs and address access is currently turned off for all Portal users. If access to addresses and dates of birth is reactivated in Portal, the Counties would like a broader discussion on which roles should receive this access.

Statutorily confidential items displaying as public. Events added to confidential cases are showing as public. *A service ticket will be submitted to AOC for this issue.*

Court Lobby Issues.

a. **Search screen 'predictive search function.'** Applies to kiosks in the court lobby. The search screen 'remembers' the last search (case numbers and names) performed and auto-populates this information for the next user(s). *This is related to the way the County has the internet browser configured on the workstations. It is not related to a Portal function.*
b. **All case type 8s (even sealed) displaying.** *Tyler Technologies ran a script to fix this issue. However, there are some issues around viewing Juvenile Offender information. May need additional tweaks with the ORS codes. This should only affect anonymous users currently.*

GR 22 requirements not bring met? There is some concern that Portal does not differentiate the different attorney types in family law cases that fall under GR 22, and that some counsel may have access to documents they should not. For example: the confidential information form should be seen by the AOR for the party who submitted it; however, opposing counsel has access to it too. Adding new event codes may help differentiate.

Event numbers and sub numbers are not appearing on the document tab. *Tyler Technologies expects to have a solution in January 2017, but this is a current problem.*