Information Technology Advisory Committee (ITAC)

Public Business Meeting
February 2, 2018 Teleconference

Hon. Sheila F. Hanson
Chair, Information Technology Advisory Committee

Administrative Matters

I.   Open Meeting

   • Call to Order, Roll Call

   • Approve December 4 Minutes

   DRAFT Minutes are in the materials e-binder.

II. Public Comment

Item 1. Chair Report

Hon. Sheila F. Hanson

Chair, Information Technology Advisory Committee

There are no additional slides for this report.

Item 2. Judicial Council Technology Committee Update

Hon. Marsha Slough, Chair, JCTC

There are no additional slides for this report.

REPORT

Item 3. Branch Budget Update

Mr. Zlatko Theodorovic, Director, Judicial Council Budget Services

There are no additional slides for this report.

Item 4. Judicial Council Operations & Programs Division Update

Mr. Robert Oyung, Chief Operating Officer
Judicial Council

There are no additional slides for this report.

Item 5. Modernization Project Rules Proposal – Proposed Amendments to Title 2, Division 3, Chapter 2

Hon. Peter Siggins, Executive Sponsor
Mr. Patrick O'Donnell, Managing Attorney
Ms. Andrea Jaramillo, Attorney II

Advance to the next slide for this report

Requested Action of ITAC

- Discuss proposal

- Consider recommendation to circulate proposed amendments to title 2, division 3, chapter 2 (responding to new requirements in CCP §1010.6) for public comment

Item 6. Modernization Project Form Proposal, Withdrawal of Consent to Electronic Service

Hon. Peter Siggins, Executive Sponsor
Mr. Patrick O'Donnell, Managing Attorney
Ms. Andrea Jaramillo, Attorney II

Advance to the next slide for this report

Requested Action of ITAC

- Discuss proposal and updates

- Consider recommendation to circulate proposed form EFS-006-CV *Withdrawal of Consent to Electronic Service* for public comment

Item 7. Remote Access for Government Entities, Parties, Attorneys Rules Proposal– Proposed Amendments to Title 2, Division 1, Chapter 2 of the California Rules of Court

Hon. Peter Siggins, Executive Sponsor
Mr. Patrick O'Donnell, Managing Attorney
Ms. Andrea Jaramillo, Attorney II

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Remote Access for Government…

Goals:

- Facilitate existing relationships.

- Provide clear authority to the courts.

- Limit remote access to the same records a person could get by looking them up at the courthouse.

- Keep within the scope of the annual agenda.

Requested Action of ITAC

- Discuss proposal

- Consider recommendation to circulate proposed amendments to title 2, division 1, chapter 2 (facilitating remote access to trial court records) for public comment

Item 8. Project Spotlight

Intelligent Forms Strategy Phase 1

Hon. Jackson Lucky, Executive Sponsor
Ms. Camilla Kieliger, Senior Analyst

Advance to the next slide for this report

Workstream Charge

- Improve alignment with CMSs – standardized forms definitions, delivery methods

- Forms security

- Alternatives to graphic forms

- Forms repository

- Phase II recommendations

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Activities & Status

The workstream has:

- Described how forms are used and their impact on the administration of justice

- Identified the problems we see as the most important to address

- Described the framework for a possible solution which will also serve as the outline for an RFI

Activities & Status (cont.)

Obstacles:

- Lack of access to key stakeholders (e.g., CMS/EFSP/EFM vendors)

- Coordination with other workstreams working on associated projects

Highlights

- Main issue is the lack of integration between forms and CMSs/EFSPs/EFMs

- Great debate of open source v. established vendor programs

- The many disparate data streams that have to converge into one led to the idea of creating a template processor: a public web application programming interface to populate forms

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Highlights (cont.)

- Creating dynamic forms will require greater control over forms creation

- Focus is adopting new technology without obsolescence of legacy forms

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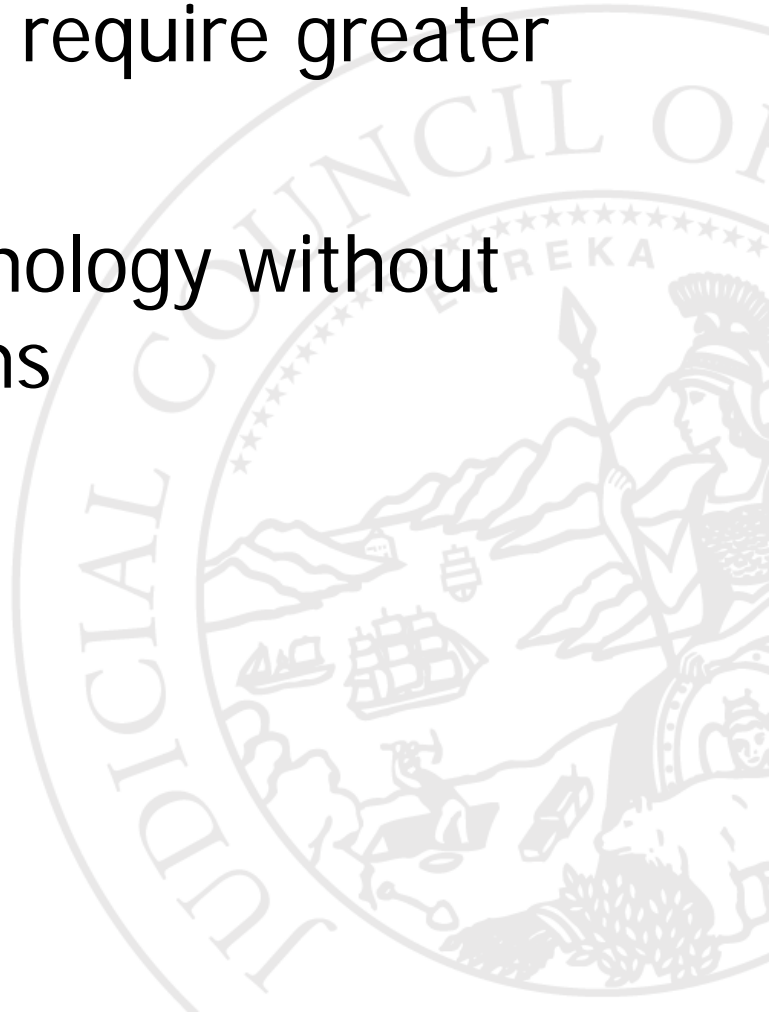
Timeline/Next Steps

- The workstream has drafted its recommendations and will submit a report for ITAC's consideration at its next meeting
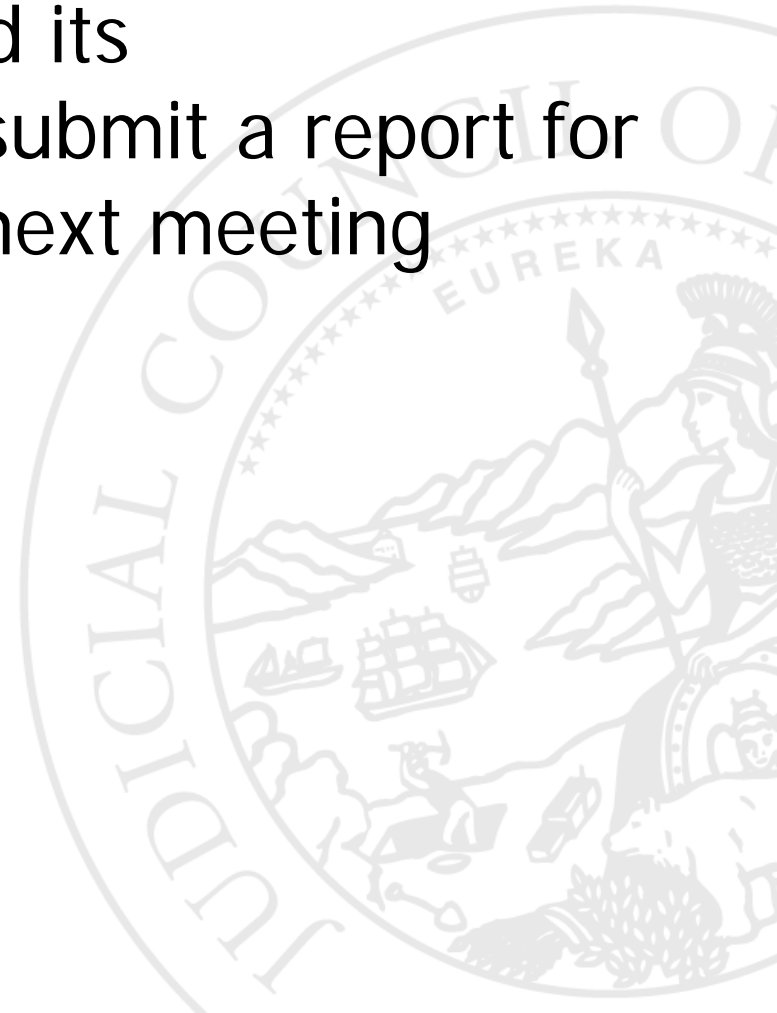
REPORTS

Item 8. Project Spotlight

Self-Represented Litigants E-Services

Hon. James Mize, Executive Sponsor

Hon. Michael Groch, Executive Sponsor

Mr. Brett Howard, Court Lead

Mr. Mark Gelade, Supervisor

Advance to the next slide for this report

# Statewide SRL e-Services Portal

Project Spotlight

Workstream Charge

- **Develop Requirements and a Request for Proposal (RFP) for Establishing a Statewide Self-Represented Litigants (SRL) E-Services Solution**

- Major Tasks include:

  - Develop requirements for enhanced e-services to facilitate intelligent triage/FAQ tools; Document Assembly platform, and

  - Determine implementation options that accelerate e-services while leveraging existing branch, local court, and vendor resources.

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Activities & Status

- An initial high-level visualization of the SRL E-Services solution helped guide and focus the Workstream's efforts



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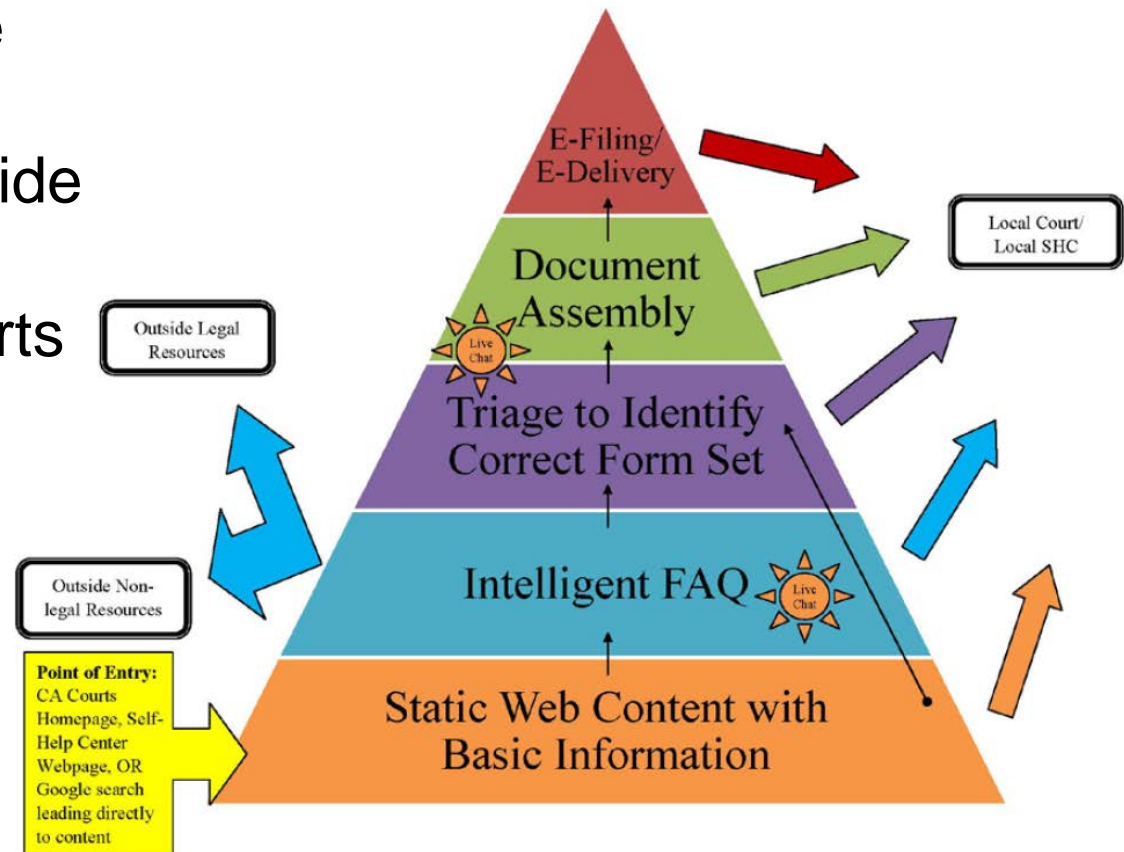
Activities & Status

- The Workstream initially conducted a research phase and formed four workgroups:

  - Existing solutions

  - Technology

  - Document access

  - Requirements definition

Highlights

- In September 2017, the Workstream had a strong enough concept to draft and issue a **Request for Information** (RFI) from the vendor community. A new visualization helped portray the envisioned solution to RFI respondents.
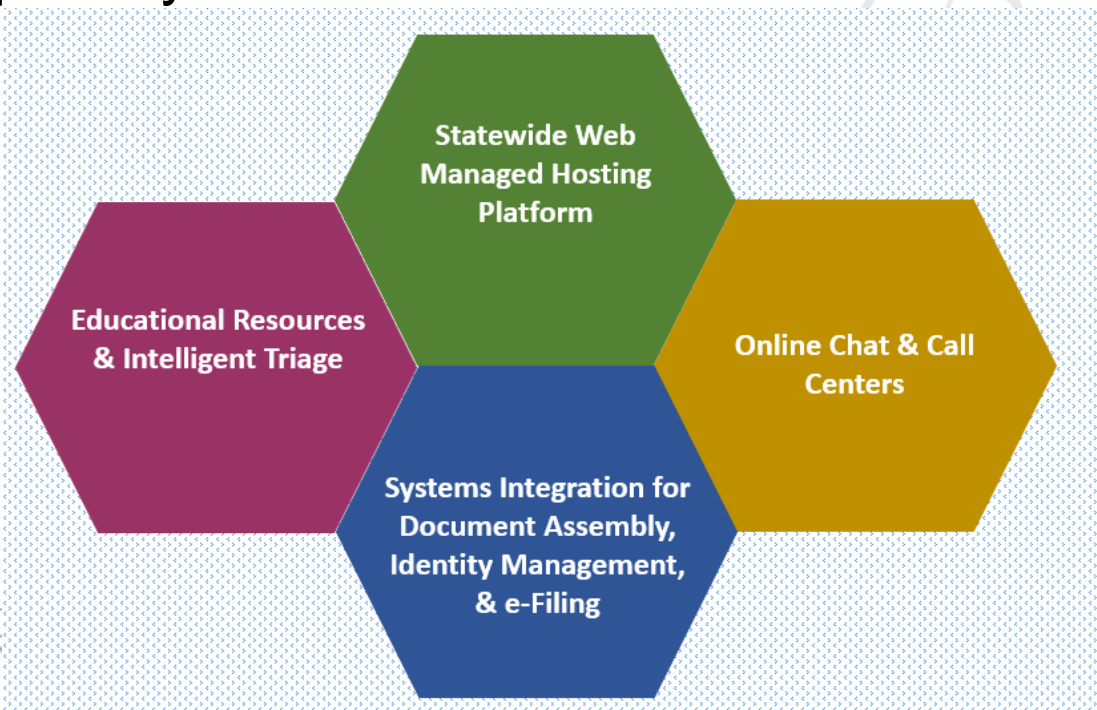
Highlights

- The envisioned solution calls for a new statewide managed-hosting Web portal, interactive instructional materials, an online dispute resolution engine, intelligent chat and triage, and integration with Identity Management and e-Filing solutions.

- Received four responses to the RFI from Catapult, Tyler Technologies, Infojini and AgreeYa

- The responses to the RFI were helpful but not significant in aiding the RFP effort

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Highlights

- In January, 2018, a draft of a Budget Change Proposal (BCP) was submitted to JCC Budget Services for inclusion in requests to the Department of Finance.

- The BCP proposal includes a funding request for $3.8 million dollars to design, build, and maintain a statewide Self-Represented Litigants (SRL) e-Services Portal.

- The BCP also requests 600K annually for ongoing operational expenses including JCC staff and license costs.

Timeline/Next Steps

- January 2018   BCP JCC Executive Office Review

- February 2018   ITAC Update and Presentation

- February 2018   Kickoff RFP Effort

- January–July 2018   Track and Support BCP Milestones

Item 9. Liaison Reports

Reports from members appointed as liaisons to/from other advisory bodies are invited to highlight key accomplishments.
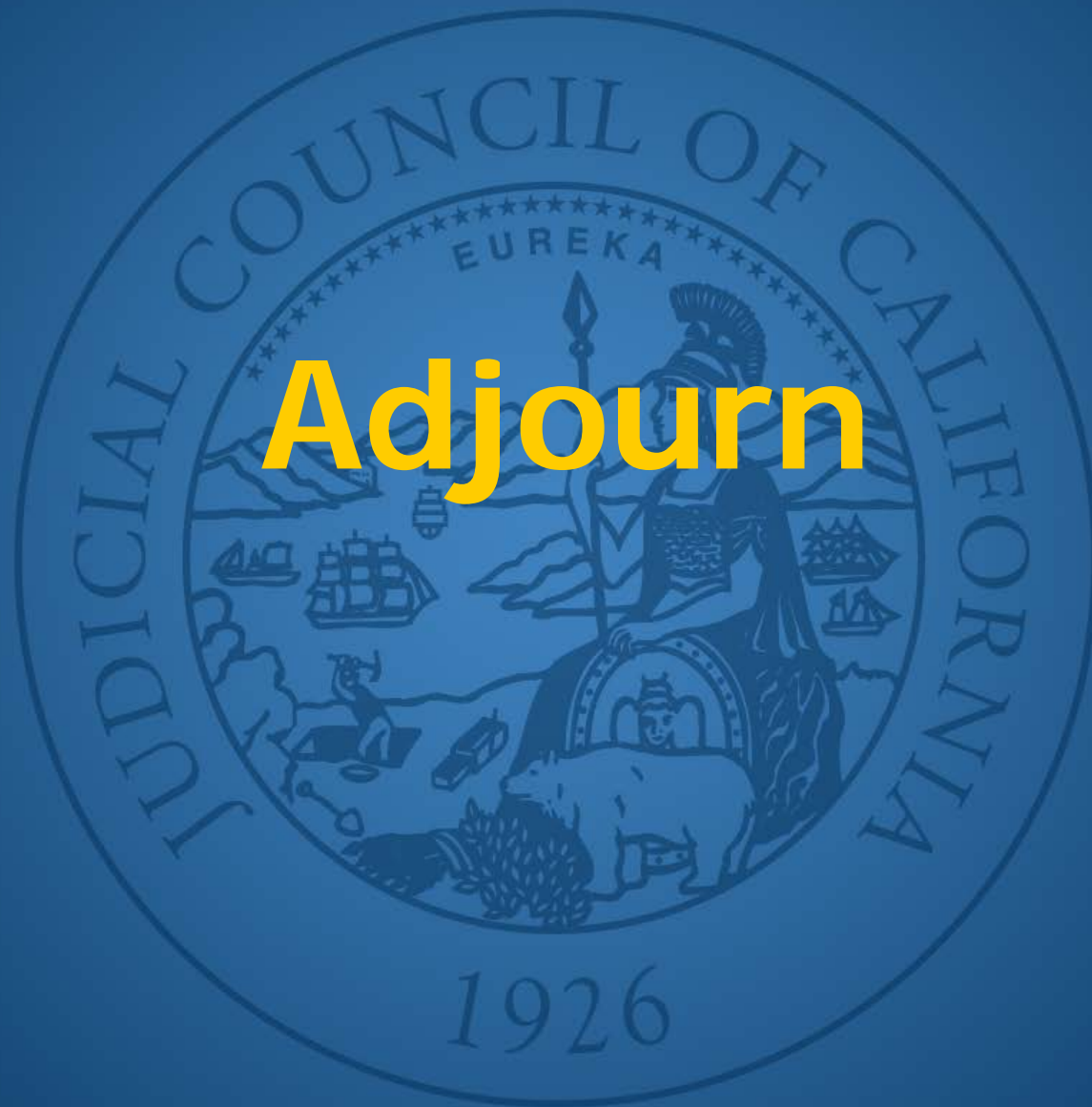
There are no additional slides for this report.

REPORTS

Item 10. General Updates/New Business

(time permitting)

Members are invited to highlight key accomplishments since the last meeting.

There are no additional slides for this report.

Adjourn

End of Presentation (Slides)

Meeting materials e-binder containing supplemental materials is provided separately.