

Information Technology Advisory Committee (ITAC)

Public Business Meeting
March 16, 2018 Teleconference

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

Administrative Matters

I. Open Meeting

- Call to Order, Roll Call

II. Public Comment



Item 1. Chair Report

Hon. Sheila F. Hanson

Chair, Information Technology Advisory
Committee

There are no additional slides for this report.

REPORTS

Item 2. Project Spotlight

Intelligent Forms Strategy Phase 1

Hon. Jackson Lucky, Executive Sponsor

Ms. Camilla Kieliger, Project Manager,
Senior Analyst

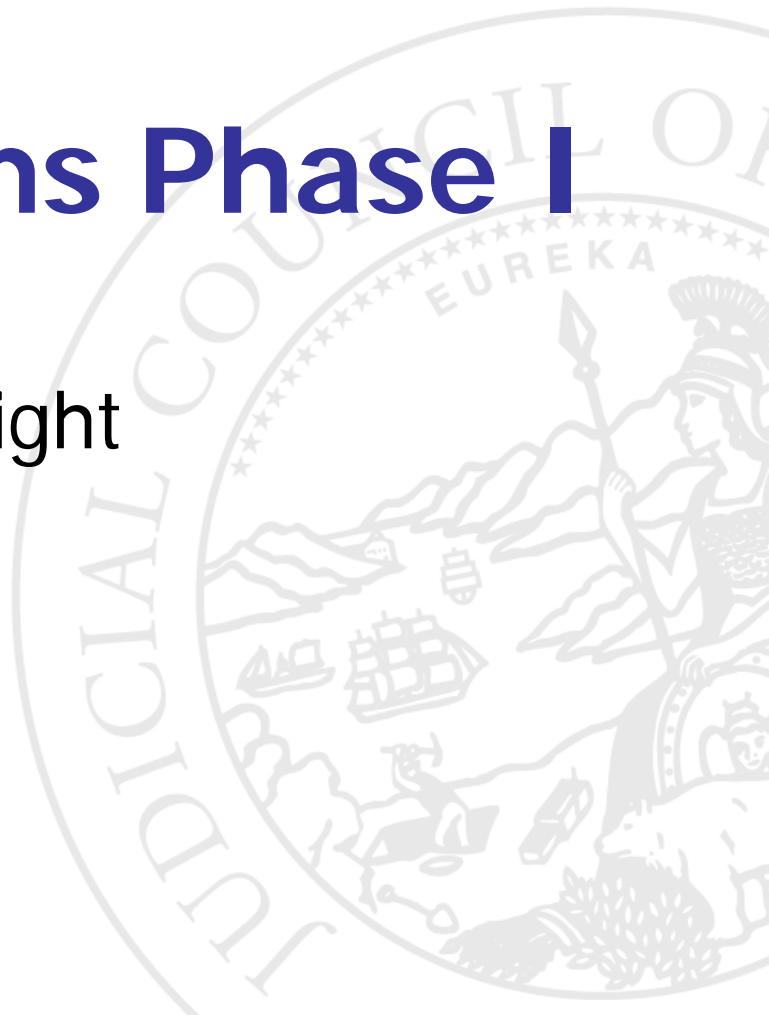
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Intelligent Forms Phase I

Project Spotlight



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Workstream Charge

- Improve alignment with CMSs – standardized forms definitions, delivery methods
- Forms security
- Alternatives to graphic forms
- Forms repository
- Phase II recommendations



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



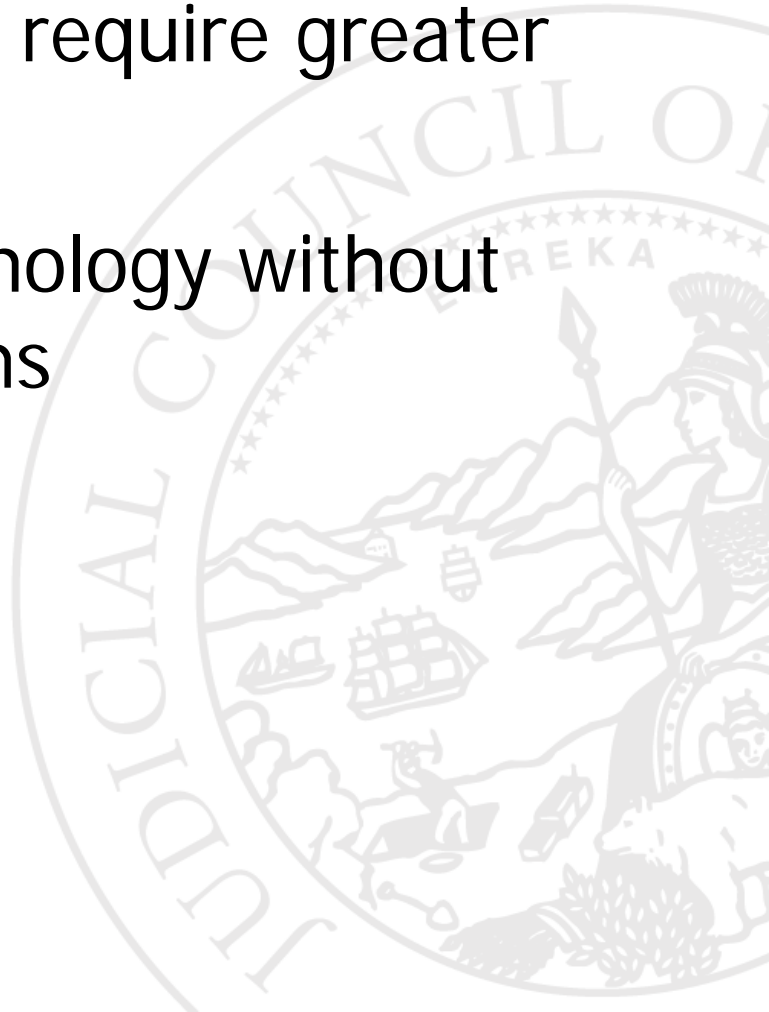
Highlights

- 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



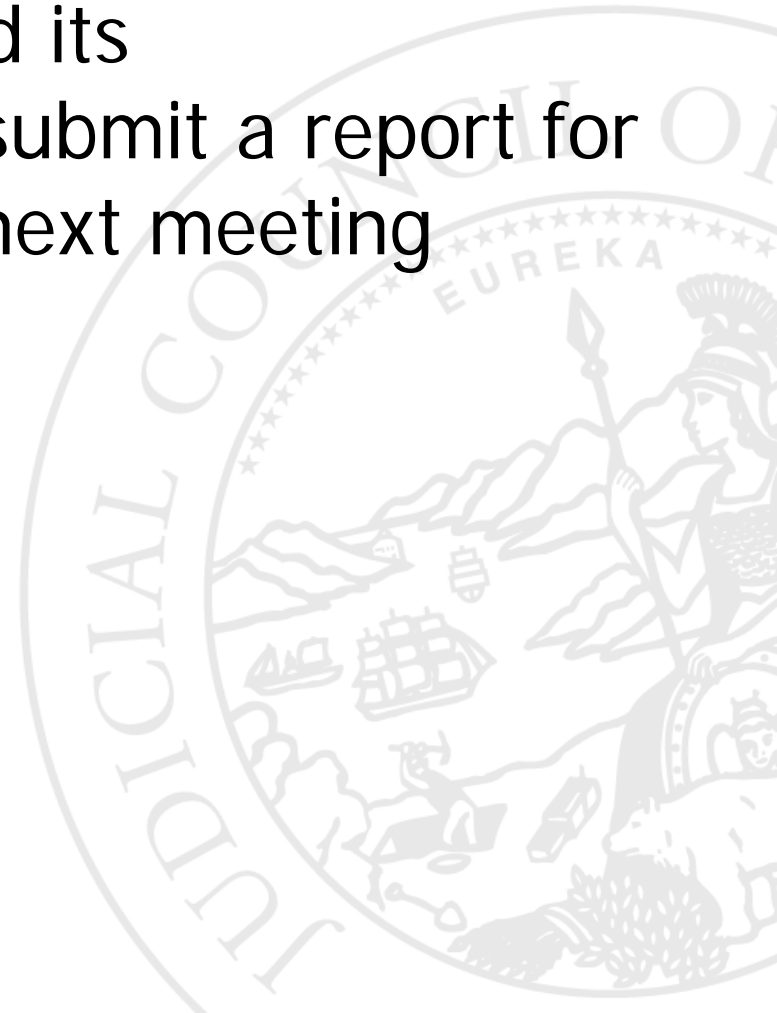
Highlights (cont.)

- Creating dynamic forms will require greater control over forms creation
- Focus is adopting new technology without obsolescence of legacy forms



Timeline/Next Steps

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



REPORTS

Item 2. Project Spotlight

Self-Represented Litigants E-Services

Hon. James Mize, Co-Executive Sponsor

Hon. Michael Groch, Co-Executive Sponsor

Mr. Brett Howard, Court Lead, Project Manager

Mr. Mark Gelade, Supervisor, SME

Advance to the next slide for this report

Statewide SRL e-Services Portal

Project Spotlight



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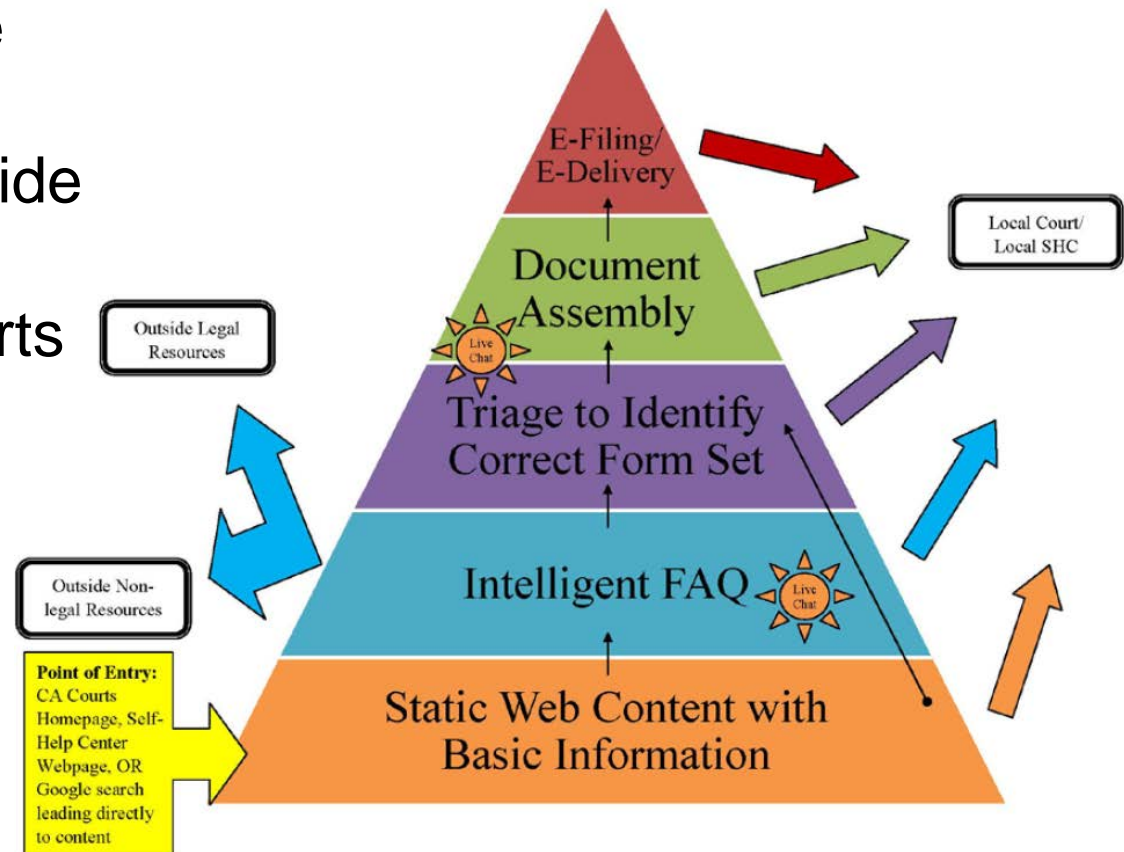
Workstream Charge

- **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.



Activities & Status

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



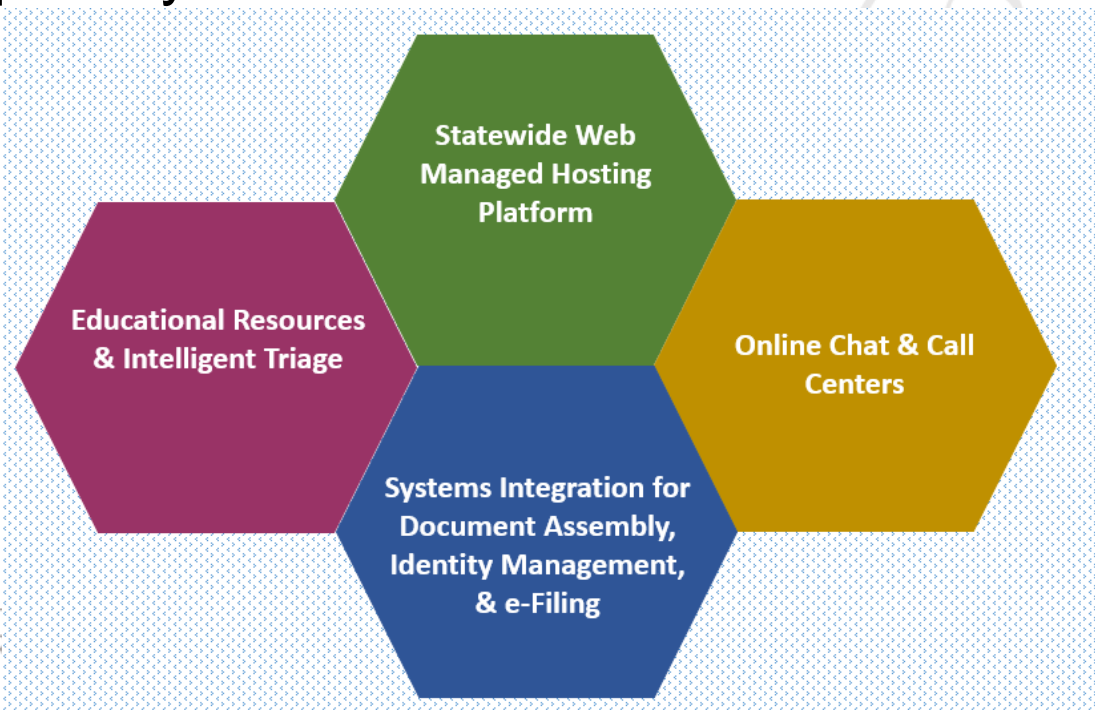
Activities & Status

- 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



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





Adjourn