



JUDICIAL COUNCIL OF CALIFORNIA

INFORMATION TECHNOLOGY
ADVISORY COMMITTEE

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INFORMATION TECHNOLOGY ADVISORY COMMITTEE

MINUTES OF OPEN MEETING

December 7, 2020

10:00 AM to 12:30 PM

Videoconference

Advisory Body Members Present:	Hon. Sheila F. Hanson, Chair; Hon. Louis R. Mauro, Vice Chair; Mr. Adam Creiglow; Mr. Jake Chatters; Mr. Brian Cotta; Hon. Julie R. Culver; Hon. Tara Desautels; Ms. Alexandra Grimwade; Hon. Michael S. Groch; Mr. Paras Gupta; Hon. Samantha P. Jessner; Hon. James Mize; Mr. Snorri Ogata; Mr. Darrel Parker; Hon. Donald Segerstrom; Hon. Peter Siggins; Hon. Bruce Smith; Ms. Jeannette Vannoy; Mr. Don Willenburg; Mr. David H. Yamasaki; Hon. Theodore Zayner
Advisory Body Members Absent:	Assemblymember Marc Berman; Senator Robert Hertzberg; Hon. Kimberly Menninger; Hon. Joseph Wiseman
Others Present:	Hon. Kyle Brodie; Ms. Heather Pettit; Mr. Mark Dusman; Ms. Jamel Jones; Ms. Camilla Kieliger; Ms. Andrea Jaramillo; Ms. Jackie Woods and other JCC staff present

OPEN MEETING

Call to Order and Roll Call

The chair called the meeting to order at 10:02 AM and took roll call.

Approval of Minutes

The advisory body reviewed and approved the minutes of the November 2, 2020, Information Technology Advisory Committee meeting. Judge Zayner abstained as he did not attend the meeting.

DISCUSSION AND ACTION ITEMS (ITEMS 1-7)

Item 1

Chair's Report

Presenter: Hon. Sheila F. Hanson, Chair

Update: Judge Hanson welcomed members and provided several updates.

The Judicial Council voted to accept the report presented by the Intelligent Chat Workstream at its November 13 meeting. This completed the second of three Futures Commission directives assigned to ITAC. Judge Hanson congratulated Judge Groch and the workstream members for their hard work.

Judge Hanson then announced that Justice Siggins will be retiring on January 19, 2021, after 32 years of state service. Along with many other council appointments, Justice Siggins has been a member of the Information Technology Advisory Committee and served as the chair of the Rules & Policy Subcommittee since November 2014. He has led the effort to support the branch's ability to conduct business by electronic means, including the comprehensive set of rules detailing access to electronic court records developed by the Joint Ad Hoc Subcommittee on Remote Access to Court Records. Those rules were approved by the council in September 2018 and established the foundation for subsequent efforts related to e-filing, identity management and other activities supporting remote access to the courts.

Judge Hanson thanked Justice Siggins on behalf of the committee for his dedication and hard work and wished him well in retirement.

Item 2

Judicial Council Technology Committee Update

Update on activities and news coming from this internal oversight committee.

Presenter: Hon. Kyle S. Brodie, Chair, Technology Committee

Update: Judge Brodie provided an update on the Judicial Council Technology Committee's work since his last report on October 2.

The committee held an open meeting on October 9, a closed meeting on December 2, and two actions by email. Topics included Information Technology Advisory Committee items:

- The Futures Commission Voice-to-Text final report for submission to the Judicial Council was approved.
- The Data Analytics Workstream provided an overview of initial findings and next steps.

For the \$25M modernization funding allocations, the committee reviewed proposed funding models, allocation methodology program requirements, and the proposed application process. The committee approved the following model:

- \$12.5M in direct allocations to the trial courts;
- \$10M to fund branchwide initiatives, trial court grant programs, and Judicial Council support services; and
- \$2.5M in reserve to account for unexpected expenses, capture additional modernization opportunities, or leverage efficiencies that may arise.

The committee's next meeting will be on December 14.

Item 3

Court Technology Modernization Funding – Update and Status

Receive an update on activities related to the allocation of court technology modernization funding

Presenters: Hon. Kyle S. Brodie, Chair, Technology Committee
Ms. Heather Pettit, Chief Information Officer

Update: Judge Brodie explained the process that will be used to allocate funds, balancing the needs of the trial courts.

Ms. Pettit reported that all 58 trial courts applied, submitting very thorough and detailed project funding requests. This year a fast turnaround was required, but in the future, a group of court representatives may be established to review applications and projects. Next steps are to approve funding requests, and to submit a budget change proposal in January 2021 for 22/23 FY to request permanent funding.

Item 4

Branchwide Electronic Filing

Discussion on a potential expansion of the branchwide e-filing program.

Presenters: Mr. Snorri Ogata, CIO, Superior Court of Los Angeles County
Ms. Heather Pettit, Chief Information Officer

Update: Ms. Pettit provided an update on this project. Master service agreements were completed with two electronic filing manager vendors (Journal Technologies and ImageSoft); Tyler Industries decided after two years of negotiations that they do not wish to participate.

Ms. Pettit and Mr. Ogata suggested that the branch form a working group to evaluate e-filing solutions from today's perspective. The working group would make recommendations that would allow open friendly competition, work for both the trial and appellate courts, and standardize pricing for court users. The group would also review e-filing rules and statutes language for needed updates.

This approach does not mean that contracts with other vendors are no longer important, since many courts are currently working with those vendors to bring their e-filing solution online.

Members were encouraged to inform the chairs of any interest in participating in the ad hoc group.

Item 5

Updating Technical Guidelines Related to Remote Video

The Judicial Council approved the [Recommended Guidelines for Video Remote Interpreting \(VRI\) for Spoken Language-Interpreted Events](#) on March 15, 2019 with the expectation that updates would be considered, when appropriate. Members will consider the timeliness and potential participation in proposing updates to the guidelines.

Presenter: Ms. Heather Pettit, Chief Information Officer

Update: Judge Hanson noted that since the existing guidelines were approved at the March 2019 Judicial Council meeting, the branch has expedited the use of remote video and the guidelines may need to be updated.

Ms. Pettit mentioned that a majority of courts submitted proposals for video remote interpreting efforts under the \$25M modernization funding program. Given developments during the COVID-19 pandemic, the existing requirements need to be updated to include virtual locations and current platforms.

Mr. Denton suggested that a review and update of the guidelines can be completed quickly, with updates presented to the committee at the January meeting, and a final version targeting the Judicial Council's May 2021 meeting. Judge Jessner, Justice Mauro, Ms. Vannoy, and Mr. Chatters volunteered to participate.

Item 6

Update on Statewide Self Represented Litigant Portal

The project team seeks to update committee members on the progress of a branchwide collaboration to improve the accessibility, usefulness, and breadth of online, statewide information for self-represented litigants.

Presenters: Ms. Bonnie Hough, Principal Manager, Center for Families, Children and the Courts
Mr. Mark Gelade, IT Supervisor, Web Services
Mr. Jack Madans, Project Lead

Update: Ms. Hough began the presentation by emphasizing the importance of the availability of the self-help web portal, especially during the COVID-19 pandemic, allowing courts to serve more self-represented litigants online. There is a considerable need for help in civil cases, including housing and consumer debt concerns.

Mr. Madans noted that users of the self-help portal consist of not only the self-represented user, but also advocates that assist them, including lawyers, court staff and judicial officers. Using divorce as a test case scenario, Mr. Madans provided an overview of the tools available on the portal as well as the underlying design considerations.

Additional case types, including evictions, are under development and expected to be active by March. The new self-help web portal will be a hybrid site that can transition users to local court self-help services. Future iterations could include functions such as case look-ups, identity management and other integrations as they are developed.

Mr. Gelade provided information about the new Drupal platform. Next steps include migrating courts to the platform by July 2021. Courts will be able to take advantage of user experience and digital service design improvements, and the project will include end-user training, user guides, and live webinars.

Item 7

Annual Agenda and Written Workstream and Subcommittee Status Reports (Action Required)

Chairs and Executive Sponsors will provide an overview of current initiatives and introduce proposed Annual Agenda items for 2021 for ITAC's consideration and approval.

Action: Staff presented the written status reports and the 2021 annual agenda descriptions, as Executive Sponsors provided updates on their progress and plans for next year.

Futures Commission Directive: Voice-to-Text Language Services Outside the Courtroom

Hon. James Mize, Executive Sponsor

This directive will be presented to the Judicial Council at the January 22, 2021, meeting. The pilot program staff met with seven courts last week to provide an overview of the program and a demonstration of the tool. Lastly, the name selected for the tool is the "California Court Translator".

Tactical Plan for Technology Update Workstream

Hon. Sheila F. Hanson, Executive Sponsor

The 2021-2022 plan is being prepared for circulation for comments.

Identity and Access Management Strategy Workstream

Mr. Snorri Ogata, Executive Sponsor

No additional updates. Request to extend to March 2021.

Digital Evidence: Rules, Technology, and Pilot Evaluation

Hon. Kimberly Menninger, Executive Sponsor, Mr. Jake Chatters presenting

The workstream handed over the rules component to the Rules & Policy Subcommittee, so that objective is complete. The workstream is drafting a survey regarding digital evidence and will be asking courts to provide any local rules or procedures. This survey will help the workstream document workflows, evaluate technology, develop use case scenarios, and set criteria for future pilots. Work is being done in Placer and Orange counties over the next year.

Data Analytics: Assess and Report

Hon. Tara Desautels and Mr. David Yamasaki, Executive Sponsors

Proposing to present at the May Judicial Council meeting instead of March to allow sufficient public comment time and for any changes that might need to be made.

Disaster Recovery (DR) Initial Pilot and Knowledge Sharing

Mr. Paras Gupta, Executive Sponsor

Working on roadmap documentation for any court to use. Will include findings, tools, and templates. Will reference back to concepts from the initial DR Phase 1 workstream document, and will allow for other options other than cloud only. The June 2021 target date includes all approvals; however, the Phase 2 draft document will be ready sooner.

Online Dispute Resolution (ODR): Research Workstream

Hon. Julie Culver, Executive Sponsor

October and November were busy visiting with many states and vendors. Starting work on the report with help from Judicial Council staff and court staff to help with the rules. Requesting an extension for May 2021.

Branchwide Information Security Roadmap Workstream

Hon. Donald I. Segerstrom and Mr. Brian Cotta, Executive Sponsors

Working with other workstreams to look at needs across the branch. The current branch security vendor is participating in meetings and is a valued contributor. Workstream tasks include looking at recommending and balancing policies, recommending security standards and approaches. Extension request for March 2021.

Rules & Policy Subcommittee

Hon. Peter Siggins, Chair

Rule proposal set to take effect January 2021 on allowing those that do not consent to e-services to still e-file. New projects include the referral on rules around digital evidence; working with the Criminal Law Advisory Committee to allow video proceedings in criminal law cases; and developing a proposal to amend permissive electronic filing and electronic service rules to reference Penal Code section 690.5.

Joint Ad Hoc Subcommittee: Remote Video Appearances in Civil Proceedings

Hon. Peter Siggins, Co-Chair

Project is just getting underway. There will be statutory changes presented to the Judicial Council at their January meeting.

Motion to approve the Annual Agenda as revised.

Approved.

The final agenda will be posted to the public website.

A D J O U R N M E N T

There being no further business, the meeting was adjourned at 12:11 PM.

Approved by the advisory body on January 27, 2021.