

Judicial Information Systems Council Meeting (JIFFY)

Meeting Minutes

Judicial Information Division

Thursday, September 18, 2014

9:38 - 12:00 p.m.

JIFFY Voting Members Present:

Judge Michael Bustamante, Chair

Judge Karen Mitchell, Vice Chair

Judge Duane Castleberry

Judge Stan Whitaker

Greg Ireland

Judge Henry Alaniz

Judge Richard Knowles (phone)

Dennis Jontz

Judge Alan Kirk

Tobie Fouratt

JID Staff Present:

Helen Miller

Pat Mente

Carlos Cordova

Grace Catanach

Annie Hall

Guests Present:

Oscar Arevalo

Orlando Ulibarri (video)

Judge Sharon Walton

Frank DiMaggio (video)

Tony Ortiz

Heather Velasquez

David Vermooten

Linda Freeman

Joe Moore (video)

David Madrid (video)

Robert Padilla

Jonathan Ash

Pat Simpson

JIFFY Non-Voting Members Present:

Justice Petra Jimenez-Maes

Artie Pepin

Renee Cascio

I. Approval of Agenda. Judge Bustamante called the meeting to order at 9:38 a.m. The agenda was accepted as presented.

II. Budget and Revenue.

JID Revenue Pipeline. Oscar Arevalo presented the “*JID Revenue Pipeline*” and reported that case filings in district courts were 3.7 percent lower in 2014 than 2013. Criminal cases were up by more than 1 percent while civil was down almost 5.5 percent. Out of the four contributors comprising MVD, the magistrate courts, BCMC and the district courts, MVD contributed \$180,000 more in 2014 than 2013. Magistrate courts were down about \$1600, BCMC was

down \$13,600 and the district courts were down \$61,000 with an overall increase of 3.1 percent from 2013 to 2014. Based on the collections (page 1) received through August 2014, there is a projected decrease of approximately \$30,000 for this fiscal year. If all of the budget capacity is expensed (page 3), there would still be \$35,413 of funds available. The total ending fund balance as of August 2014 from all sources (page 4) is \$910,287, some of which will go towards Odyssey expenses. The case management projected civil filing fees (page 6) for FY15 is \$671,844.34 down approximately \$10,000 from last year. All projected transfers (page 7) from Las Cruces and Santa Fe have been removed from the Red Light Camera revenue.

- Mr. Arevalo explained that the comments that had to do with RCS (page 9) were a result of technical changes in the courts which affected RCS (Fiscal's reconciliation software) and it was down for a short time. Renee Cascio added that monies for the replacement of RCS is one of the C2 requests for this fiscal year.
- Artie Pepin stated that e-filing revenue is being used to pay our Tyler maintenance costs of close to \$900,000 a year.
- Mr. Arevalo introduced Heather Velasquez who is the new field services supervisor for accounts receivable in Fiscal. E-payments will be starting next week and Heather will be working with JID staff on that project and the hope is that will make it simpler for users to pay their fines and fees and account for increase in revenues.

III. JIFFY Subcommittee Activities.

Odyssey Judges User Group. Judge Mitchell reported that Odyssey Judges User Group (OJUG) met this morning.

Disposition Code Committee. Judge Singleton presented the disposition codes for civil cases and OJUG approved sending them to JIFFY. Two handouts will be sent to the JIFFY members, one which reads "*Judgment Codes: Non-Criminal: Recommend: RETAIN*" and the other "*Judgment Codes: Non-Criminal: Recommend: ELIMINATE.*" The philosophy of the Disposition Code Committee is to shorten the disposition codes but still capture the detail in event codes. Odyssey allows for a great deal of flexibility, in that there can be a decree or judgment entered as the disposition code and the event code would describe the particulars of that specific type of case. In the report marked ELIMINATE, many of the codes the committee recommended to eliminate could have a decision created using an event code and others were

covered by codes in the RETAIN category. An overall process is being implemented by another committee for bankruptcy cases. Abuse and Neglect cases are being rewritten and reworked.

Task Manager. Judge Mitchell stated that Renee Cascio presented three charts with information about a new Odyssey product from Tyler called Task Manager. Ms. Cascio described Task Manager in that it can be compared to email. Task Manager can be opened in Odyssey and it can be separated and downloaded onto a desktop. When a predefined activity in Odyssey occurs, notification can be sent to whoever needs that information. The first task that is being put together is Judge Reassignment, through excusal or recusal. When an excusal occurs, the judge who lost the case and the judge to whom the case was assigned will be notified. In a recusal, only the judge who received the case will be notified. The judge can then make notes and route that notification to anyone else (such as TCAAs) through a different queue. Motion Filed will be the second task to be implemented. When a judge needs to act on a motion that is filed and there are activities the judges need to be aware of, the judge will receive notification. Warrants that are issued and need to be signed in district courts can be sent through Task Manager and be e-signed by the judge as well as forwarded and docketed in Odyssey.

Forms Committee. Judge Mitchell reported that the Forms Committee met and forms were sent to Joey Moya to determine if those forms need to be reviewed by the Supreme Court or if they meet the criteria for an internal form. The forms are raising questions such as how, when and why the form is used. How consolidated cases are counted and how to capture when changes are made to release conditions are questions that have been raised concerning how that affects the data. Judge Mitchell asked JIFFY to consider what, when and how Phase II will be implemented for the BCMC rollout and how to migrate from Browse Docket and Traffic Arraignment to a true Odyssey platform. The direction the Forms Committee takes will depend on how Phase II will be implemented for BCMC. Renee Cascio informed JIFFY that Tyler is going to schedule sprint development reviews with staff from BCMC and JID as Tyler is developing Clerk Edition to replace Traffic Arraignment. Ms. Cascio has asked Tyler to do a fit assessment to determine whether Browse Docket can or cannot be integrated into Odyssey.

Online Access Committee. Judge Bustamante stated that the Online Access Committee did not meet in September but there is a new version of the Matrix and that will be presented at the October JIFFY meeting.

IV. CIO Report. Renee Cascio reported that for Proposed Orders there is a new process that can be turned on in File & Serve and Tyler is doing WebEx training with some judges and will turn the control over to the judges and walk them through it step by step on what will be

required of the judges in order to use Proposed Orders and File & Serve. Three judges have been through the training and all three find it acceptable and that it will save them steps over the current email process. It will be rolled out in the 2nd JDC with domestic cases November 4 on an opt-in basis and on January 1, 2015 it will become mandatory at the 2nd JDC. A plan will be developed to roll that out to the rest of the courts before the end of the year. The plan was to eliminate the Proposed Orders email accounts, however that is not feasible and 250 more email accounts have been ordered which will cost \$10,000 to increase email capability. As a part of e-filing, a pilot has been conducted for Child Support Enforcement Division (CSED) cases and JID would like to role this in with Proposed Orders and DM cases as one project.

E-payment. A successful receipt has been generated for the E-payments project and a pilot is planned for Torrance County in the next two or three weeks. Torrance County has credit card accounts with the credit card company and they can deposit directly into the bank account for the court. Chase payment tech accounts need to be established for all of the magistrate courts and BCMC through Fiscal. Parties will be able to pay fines and fees but not bonds through the e-payment system.

Judge Edition. A scheduled update for Judge Edition will occur on Wednesday, September 22 and that version will be in use as of September 24. This is the edition that judges were trained to use at the Judges Conclave in June.

Portal. Portal was installed at JID two weeks ago, however there is a problem with the system so it is not available for Renee Cascio to get into the system and see exactly what functionality is available.

FY16 Budget. The FY16 budget was approved by the Supreme Court. The IT Plan and the C2 documents were submitted on September 2. JID will present the C2 requests at DoIT and LFC hearings in October.

New CIO. Artie Pepin informed JIFFY that Gregory Saunders has accepted the position of CIO at JID, was introduced to the members of JIFFY. Mr. Saunders will be starting on October 6, 2014 and Steve Prisoc will overlap with Mr. Saunders for the first week to acquaint him with the responsibilities of the position.

Tyler Executive Forum. Mr. Pepin reported that he and Renee Cascio met with the president and the CEO of Tyler and other states who have implemented Odyssey. Tyler has dedicated management resources to states which are utilizing Odyssey. Colleen Riley has been assigned to

New Mexico and will have direct access to upper management at Tyler in order to address Odyssey issues. Tyler stated that Portal should be ready by the first quarter of 2015. Two other states are planning to go live with the new jury product in the next three months and hopefully work out the bugs before New Mexico implements the product.

V. Purchase Requests.

AOC Request to Purchase Tablets for Magistrate Judges. The request is for the Santa Fe and Dona Ana County magistrate courts. The purchase of the tablets is to allow the judges to respond remotely to the requests received outside of business hours that must be signed. Mr. Pepin explained that the savings would add up to more than \$8000 over a three year period in a large court such as Dona Ana. The number of tablets purchased would not exceed four for both courts as only the on-call judge would take home the tablet. At some time in the future, the hope is that the tablets can be purchased for all of the magistrate courts, as the improved functionality of the tablets is more efficient for the on-call judge.

Judge Castleberry moved to approve the purchase of up to four tablets for Santa Fe County and Dona Ana County magistrate courts to be utilized by on-call judges. Judge Kirk seconded. No opposition noted. Motion carried.

Wireless Access for 9th JDC. Orlando Ulibarri requested wireless access for the 9th JDC in Clovis and Portales to be funded by the 9th JDC. There are not enough wire drops to conduct business. The wireless access would have one line for internal use and a separate line for DSL service to provide limited guest access.

Judge Castleberry moved to approve the purchase of wireless access for the 9th JDC in Clovis and Portales to be funded by the 9th JDC. Greg Ireland seconded. No opposition noted. Motion carried.

VI. Review and Approval.

Request for Access to Secure OPA from NM Sentencing Commission. Tony Ortiz, the Director of the Sentencing Commission, explained that the Sentencing Commission is housed at UNM and any project using justice data is reviewed by the institutional review board at UNM. Before the information is published, it is sent back to the agency or entity that provided the Sentencing Commission with the data for their review. The reports generated are to inform all the branches of NM government of public policy. The request for access to Secure OPA is in

part to make sure that the information is up to date and to have the ability to check any data entry errors.

Greg Ireland moved to approve the request by the Sentencing Commission to be allowed access to Secured OPA. Judge Kirk seconded. No opposition noted. Motion carried.

Remove AS400 Public Access and Limit Justice Partner Access. Artie Pepin stated that the intention (as stated in previous JIFFY meetings) is to remove the AS400 from public access and justice partner access and put the data in a more stable environment for the judges' use only.

- Mr. Pepin explained that all of the data of the last five years and all of the record cases were pushed over to Odyssey. As of March 1, 2014 no data has been entered into the AS400 making the information stored there outdated and potentially misleading.
- Judge Walton stated that BCMC opposes removing AS400 access for the public or justice partners as this would inhibit parties from finding necessary information and believes that BCMC was told that the AS400 would remain in use for the foreseeable future.
- Justice Maes pointed out that all of the essential data for DWI and DV cases have been retrieved from the AS400 and that the access for other types of cases will still be available for the judges. Judge Walton reported that justice partners are using the AS400 because documents were not pushed over and there is not a process in place to scan all of the old documents to get them into Odyssey.
- Ms. Cascio clarified that the BCMC justice partners have relied entirely on BCMC for their records, and they do not keep copies of documents as DAs and PDs in other judicial districts would do. Mr. Pepin noted that when the district courts converted to Odyssey, they began imaging and when there was an active case, whatever was in the paper file would be imaged and BCMC could do that in current cases and the documents in the file would be in Odyssey.
- Ms. Cascio informed JIFFY that there are numerous problems in the way that the AS400 was made available to the public with minimal concern for the kinds of security considerations that JID has always had with the network and feels it is critical to remove public access from the AS400, however Ms. Cascio does not know if there is a way to remove public access and still allow access to justice partners.

- At the suggestion of Judge Alaniz BCMC will develop a plan (with JID staff) to shut down the AS400 and present it to the executive committee for review the week of October 6.

All Court IT Purchases to be Pre-approved by JIFFY. Artie Pepin presented the handout entitled “*Computer Software and Information Technology Equipment Approval Policy*” and noted that this revision is dated September 8, 2014. The difference in this policy is that it does not contain a dollar figure. It is imperative for the Judicial Information Division to be aware and for JIFFY to approve IT purchases that affect the statewide judicial network. Mr. Pepin’s primary concern is that courts have added equipment or software that overloads the network in ways that are unknown and unexpected causing the system to spike or overload without JID’s knowledge.

- Judge Mitchell expressed frustration that even with the previous IT equipment approval policy, obtaining needed equipment and/or software is sometimes extremely challenging and that this new policy will make it even more difficult.
- Judge Bustamante voiced support for the revised policy as many software and hardware items are very inexpensive or free that can be purchased or downloaded by court personnel that will affect the judicial network and JID needs be made aware of what is being utilized in the court system.
- Judge Knowles suggested that JID make a list of approved devices and software that would not need the consent of JID or JIFFY. After some discussion, it was agreed that the approval policy would be reworked and brought back to JIFFY at the October 16, 2014 meeting.

VII. Future Meetings. The next meeting will be held on Thursday, October 16, 2014, 9:30 a.m. at the Judicial Information Division in Santa Fe.

VIII. Adjourn. Judge Bustamante adjourned the meeting at 12:00 noon.