

Judicial Information Systems Council Meeting (JIFFY)
Meeting Minutes

Judge Karen P. Mitchell, Chair

Judicial Information Division
2905 Rodeo Park Drive East, Building 5
Santa Fe, New Mexico 87505
505-476-6900
Thursday, November 19, 2015
9:39 - 11:08 a.m.

JIFFY Voting Members Present:

Judge Karen Mitchell, Chair
Judge Duane Castleberry
Judge Henry Alaniz
Tobie Fouratt (video)
Lynne Rhys
Brenda Castello
Ian Bezpalko
Jim Noel
Judge Mark T. Sanchez
Jason Jones (phone)
Judge Alan Kirk
Judge J. Miles Hanisee

Non-Voting Members Present:

Gregory Saunders
Justice Petra Jimenez Maes

Guests Present:

Jonathan Ash
Barry Massey
Frank DiMaggio (video)
Oscar Arevalo
Colleen Reilly
Rachelle Klump
Betina McCracken
Jeremy Toulouse
Carl Reistock (video)

JID Staff Present:

Jane Davenport
Jo Warren
Genevieve Grant
Melinda Griego
Annie Hall
Carlos Cordova
Marsha Davis
Wesley Reynolds
Renee Cordova
Pat Mentel
Tim Elsbrock
Margarita Terrell

I. Approval of Agenda. Judge Mitchell called the meeting to order at 9:39 a.m. Statewide e-filing rollout for CSED was moved to the top of the agenda and the rest of the agenda was accepted as presented.

- Judge Mitchell welcomed Colleen Reilly from Tyler and noted that Ms. Reilly plans to attend the monthly JIFFY meetings.

II. Review and Approval.

Consideration of Implementation of CSED E-filing Statewide – Jim Noel introduced Rachelle Klump the Deputy CEO for the 2nd JDC who oversees Family Court as well as the Child Support Enforcement Division (CSED) relations with 2nd JDC. Ms. Klump referred to the handout entitled “*Presentation to JIFFY November 19, 2015*” and stated that in May the 2nd JDC did a presentation of how the process of e-filing works and explained that CSED cases, civil cases and family cases are essentially processed in the same way starting with loading the petition into the system until it is approved through that system by the clerk (p 2). The flowchart on page 3 explains the process when further action is needed. Page 4 is a summary of changes that have taken place since the 2nd JDC presented at JIFFY in May 2015. The user can now submit a summons, the domestic relations sheet and their petition or complaint in one packet. Once the packet is all approved through the system, it must be emailed back to the judge’s office for notification for the hearing request. Page 5 describes the suggested plan for the rollout of CSED e-filing statewide. Phase 1 is for CSED and the district courts to assess what they need to accomplish to prepare for e-filing such as determining points of contact and what resources are available for support. CSED discussed with Ms. Klump in Phase 2 the idea that the processes between each CSED field office and the corresponding district court will be developed as the program is rolled out. Phase 3 training can be developed by both CSED and the district courts so that there can be a smooth transition. Phase 4 & 5 would be to implement the schedule based on the readiness of both offices.

- Jim Noel explained that the former director of CSED approached Mr. Noel about implementing CSED e-filing statewide.

- Justice Maes noted that the suggested plan for rollout of CSED e-filing does not include the specific districts, a timeline and a pilot (in addition to the one at 2nd JDC). How this will impact JID staff must be taken into consideration and training of clerks and attorneys is a major undertaking. In the past it was necessary to have one person dedicated to go out and do the training for the clerks and the attorneys when a new process was implemented. Justice Maes expressed concern about whether there are sufficient JID resources for this project.
- Mr. Noel clarified that e-filing with CSED is almost identical to e-filing in other civil matters. The plan needs to be developed and it is essential that JID staff be involved in this project.
- Judge Mitchell proposed that the next step would be to devise a formal plan, involve JID staff, talk to the courts, talk to staff at CSED and work on a schedule and present that to JIFFY.

Jim Noel moved that the 2nd JDC staff address JIFFY at the January 2016 meeting concerning the statewide e-filing rollout for CSED. The 2nd JDC and CSED will present a formal project plan for JIFFY to review. Judge Alaniz seconded. Judge Castleberry articulated his concern regarding how this project may affect JID resources. Betina McCracken Deputy Director of CSED stated that the rollout plan is to have a phased in implementation approach. CSED will work with each JDC directly to ascertain the specific needs of each district and the various CSED offices around the state. Greg Saunders clarified that CSED had been reluctant to move forward with this project because they were updating their computer system which will take a few years to complete. This is no longer a barrier. **No opposition noted. Motion carried.**

- Judge Mitchell noted that JIFFY will need to discuss lessons learned about how JIFFY manages projects from an enterprise system. Email, security and data standards are some of the areas that are managed from an enterprise system. The question for the members of JIFFY is how does JIFFY manage the entire NM Judiciary as an enterprise when there are independent courts and independent groups within the overall unified budget?

- Mr. Noel conveyed that the jury management system at the 2nd JDC that was developed in-house runs very well and asked that their system be considered when the new statewide jury management system is constructed.
- Justice Maes informed Mr. Noel that when BCMC was transitioning to Odyssey they were very concerned about their operations and their programs. JIFFY and JID worked with BCMC to address their concerns and it worked out very well. It is necessary to have communication. JIFFY has a structure of its membership and JIFFY members need to attend the meetings on a regular basis. JIFFY and OJUG must be a priority and asked that Mr. Noel speak with Chief Judge Nash regarding making JIFFY and OJUG a priority for the 2nd JDC.

Action Item: The 2nd JDC to report to JIFFY at the January 2016 meeting regarding their new website and how it will fit with New Mexico Judiciary's enterprise approach to the redesign of the state's web presence.

III. Budget and Revenue.

JID Revenue Pipeline. Oscar Arevalo presented the “*JID Revenue Pipeline*” and reported that (p1) it is projected that revenues will total \$3,971,324 which is \$123,096 below the amount collected in FY14. The lines that are added at the bottom of page 2 in order to compare the same four months last year. Magistrate courts, district courts, Court of Appeals, Supreme Court and Red light collections are higher than last year at this time. MVD collections are down \$115,443 and BCMC is down \$16,222 from last year. The fund balance ending in October 2015 (p4) is \$1,310,964. The monies that are encumbered have not yet been expended. There was no activity (p5) on the Odyssey/CMS section at the bottom of the page, showing that nothing has been expended in that area. The RFP went out for the jury management initiative (p6) and will close the first week of December 2015. There is a pre-encumbrance of \$194,961 on the web portal initiative and there is \$18,880 balance on the Appellate Court implementation. Net position is the available cash that AOC/JID has to cover the next fiscal year. At one point the net

position for AOC/JID was 9 million dollars a few years ago which went down to 6 million and at this point the total is 4million.

IV. JIFFY Subcommittee Activities.

Judges User Group. Judge Mitchell stated that Odyssey Judges User Group (OJUG) did not meet as Judge Singleton was in trial.

Forms Committee. Judge Mitchell stated that the Forms Committee did not meet and will not meet until January 2016.

Data Standards. Judge Mitchell reported that Data Standards met yesterday and went through all of the result codes for hearing types and made some recommendations to eliminate some codes. The recommendation from the committee is that the standard hearing results will only result the hearing not the case. The hearing results would encompass things such as whether the hearing was held or if a party failed to appear, not what happened at the hearing. There are other ways to capture what occurred and the outcome of the hearing. It simplifies the list and allows for better ways to collect data. When something is resulted in an arraignment for example, the clerk will pick “*arraignment*” and then go to the next drop down box and there will be options such as “*adjudicated*”, “*failure to appear*” or “*held*”. “*Continued*” was eliminated from the result code because “*continued*” is something that is entered on the calendar not a result of the hearing. The hearing result codes are how data gets into the system and how data is extracted from the system. If a case is continued in the calendar, then it automatically fills in a table. If a case is resulted as “*continued*”, it fills in a different table. When the data is later retrieved, the right table has to be picked in order to retrieve the correct data. Jane Davenport will update the hearing results list with changes that were made by the Data Standards Committee, that list will be presented to JIFFY and if JIFFY approves it, the next step would be to send it out to the users in order to get feedback on the proposed changes. Once the users in the field have looked at it and sent it back to Data Standards and it is brought before JIFFY a second time, the last step would be to send it to the Supreme Court for approval as a data standards policy for hearing result codes. Hearing types is the next group that the Data Standards Committee will examine and make

decisions as to which ones might need to be changed and which will remain the same.

IT Budget Strategy Committee. Judge Sanchez reported that the Budget Strategy Committee met this morning and the committee is in the process of collecting information. There are decisions to be made concerning recommendations to JIFFY.

Online Access Subcommittee. Judge Mitchell stated that the Online Access Subcommittee (OAS) did not meet this month. Judge Mitchell met with JID staff this morning regarding Portal and Odyssey Public Access (OPA) issues and based on that meeting, will call an OAS meeting in January. The subject of the meeting will center on JID's criteria used to review roles and make determinations on profiles of people requesting access to Secured OPA. OAS will review the application form and discuss with JID staff their current processes and then make recommendations to JIFFY regarding the decision process of determining who should be allowed access to Secured OPA.

Action Item: Annie Hall to send the OAS Matrix to JIFFY prior to the next meeting.

V. CIO Report. Greg Saunders reported that the Client Team has recruited for both open field staff positions. One person had been offered at position. The staff member who will handle the Alamogordo area courts will now be stationed in Roswell. An offer has been made to a candidate for Helen's position. Recruitment is continuing for a Data Base Administrator (DBA). There has been discussion around possibly hiring a contractor until a qualified DBA candidate is found.

Magistrate Scanning. Gallup is in the implementation process and the rest of the courts are on schedule.

Tyler. The Odyssey 2013 Patch testing is scheduled for December 7-10. to deal with the Internet Explorer (IE11) problem. The implementation should take place in the middle of January 2016. The File and Serve upgrade is being tested December 7-10. The Odyssey 2014 upgrade is the next major upgrade and should be available the first quarter of 2016. The Court of Appeals Odyssey

implementation is planned to take place in the summer 2016. Portal upgrade will be available for JID to test the first quarter of 2016 and the rollout is planned for Summer 2016.

Legislative Finance Committee. DoIT will be presenting their C-2 Computer Enhancement recommendations this afternoon to LFC. This is for the four items requested by JID in the Computer Enhancement Fund.

VI. Purchase Requests.

JID 87K – LAN Renewal Project. Tim Elsbrock explained that JID is requesting to spend \$87,000 for network upgrades. The network gear which encompasses the main switch needs to be replaced immediately. The equipment is ten years old. This is how JID delivers its service to its users.

Judge Alaniz moved to approve the expenditure by JID of \$87,000 for a network upgrade of the main switch. Judge Castleberry seconded. No opposition noted. Motion carried.

Email System. Greg Saunders explained that JID has been considering replacing Zimbra with another email system. A committee was formed of a number of users who investigated a number of different systems. The consensus of the group is to replace Zimbra with Gmail. JID is working on developing a pilot project and is working with Goggle on a total cost quote. JID would like to have JIFFY's consent to proceed with the preliminary negotiations without having to know a specific cost. The total estimated cost of this project will be in the vicinity of \$150,000-\$160,000. Mr. Saunders estimates that by eliminating the jury system maintenance and the Zimbra licenses that will not be used in the future, would lower the projected additional cost to somewhere between \$20,000-\$30,000.

- In response to Judge Mitchell's question concerning allocating the cost of the new email system, Mr. Saunders remarked that the new email system would be a good place to begin a discussion of distributing costs throughout the NM Judiciary. The IT Budget Strategy Committee is exploring how IT costs are best distributed.

- Mr. Elsbrock pointed out that the Gmail package includes the entire google application suite such as the google calendar and google docs. JID believes that there are times when there will be cost savings for licensing after the program has been in effect for at least a year.
- Judge Mitchell reiterated that the NM Judiciary is an enterprise system with email and if costs are allocated out to the field, individual groups may say that they do not want to use Gmail and decide that they want to use some other email system because it is less expensive and meets their needs better. Policies must be put in place through JIFFY and the Supreme Court to insure that NM Judiciary truly has an enterprise system.

Judge Alaniz moved to authorize Mr. Saunders to pursue a new email system with a minimal expenditure not to exceed \$30,000 between now and the next JIFFY meeting January 22, 2016. Lynne Rhys seconded. Mr. Saunders stated that **JID** will accept 80 accounts and spread those out between BCMC, 2nd JDC, JID and AOC to see how Gmail functions. Wesley Reynolds mentioned that user names can remain the same or be changed, however nmcourts.gov will remain. **No opposition noted. Motion carried.**

VII. Supreme Court Actions. Mr. Saunders noted that requests are sent to the Supreme Court, but at times the responses from the Supreme Court are not always communicated back to JIFFY. The actions will now go on the record as being approved by the Supreme Court and then communicated out to the rest of NM Judiciary.

Supreme Court Approval of Mescalero Tribal Pilot of Video Arraignment. The Mescalero one year video arraignment was approved by the Supreme Court.

Supreme Court Approval of JID IT Purchase Policy. The statewide IT purchasing policy will be implemented on January 1, 2016 including the whitelists and the processes used for exceptions.

- Judge Mitchell sent an email out to justice@nmcourts.gov highlighting the action items and motions that JIFFY acted upon at the October 2015 meeting. The response was very positive.

VIII. Additional Attachments.

E- Pay Update. Judge Mitchell pointed out that the e-payments have gone up significantly this month after a decline two months ago.

IX. Future Meetings. The next meeting will be held on FRIDAY, January 22, 2016 at the Judicial Information Division in Santa Fe.

- Judge Mitchell proposed that the June JIFFY meeting be moved to June 23 as the week before would conflict with the Judges' Conclave. Judge Mitchell will also move the Data Standards meeting to June 22 to coincide with JIFFY.
- Online Access Subcommittee will meet on January 22, 2016 after JIFFY from 1:00 to 3:00.

X. Adjourn. Judge Mitchell adjourned the meeting at 11:08 a.m.