

JUDICIAL COMMITTEE ON INFORMATION TECHNOLOGY

MEETING MINUTES

10:00AM – 12:00PM – February 1, 2019

Texas Association of Counties

I. Call to Order

Justice Simmons called the meeting to order at 10:03 a.m.

JCIT Voting Members

Chair, Justice Rebecca Simmons

Vice-Chair, Bob Wessels

David Escamilla

Honorable Woody Gossom Jr. (*phone*)

Honorable Dan Hinde

Cynthia Orr (*phone*)

Todd Smith

Carlos Soltero

Dean Stanzione (*phone*)

Dennis Van Metre

Honorable John Warren

Ed Wells

JCIT Liaison Members

Honorable Jeffrey Boyd

Miles Brissette (*phone*)

Honorable David Canales (*phone*)

Randy Chapman

Honorable Judy Crawford

Honorable Roy Ferguson (*phone*)

Doug Gowin (*phone*)

Honorable Blake Hawthorne

Honorable Laura Hinojosa (*phone*)

Tracy Hopper

Honorable Velva Price

Honorable Nancy Rister

Sian Schilhab

Others in Attendance

A. Balderrama, iDocket.com

Kizzy Burton, Tarrant County (*phone*)

Kelsey Clark, File and Serve (*phone*)

Terry Derrick, Tyler Technologies

Gloria Gochicoa, Travis County Juvenile Probation Department

Jesse Guerrero, File and Serve (*phone*)
Cindy Holloway, Tarrant County (*phone*)
Jeanine Hudson, DPS (*phone*)
Richard Luna, iDocket.com
Alisia Morris, Tarrant County (*phone*)
Honorable Laura Richard, Fort Bend County (*phone*)
David Robinson, Tyler Technologies
April Scott, Tyler Technologies
Steve Schenk, ProDoc eFiling
Holly Taylor, Court of Criminal Appeals
Holly Webb, Tarrant County (*phone*)
Brad Weems, Williamson County
Honorable Caroline Woodburn, Potter County (*phone*)

Office of Court Administration Staff

Casey Kennedy, Director, Information Services
Amanda Stites, Project Manager, Information Services

II. Approval of Meeting Minutes

Motion to approve November minutes as presented. **Motion by John Warren, second by Carlos Soltero – no opposition. Motion carries.**

III. Committee/Workgroup Reports

A. eFile Texas – Mr. Derrick from Tyler Technologies provided the following updates:

Civil/Criminal Update – Year-End Review: Registered users have grown by more than 100,000; 34,000 envelopes come through on a daily basis; 87 percent of filings are civil and 13 percent are criminal filings; return for correction rate is approximately 6 percent; approximately 75 percent of the case management systems are integrated; criminal eFiling rollout is focused on Group 6 with a deadline of January 2020.

Redaction Services Update – On January 2, 2019, Redaction Services was turned on. Justice Simmons asked for the number of times that the redaction tool was used. Three clerks asked that the redaction functionality be turned off for their office and OCA instructed Tyler to turn off the redaction functionality for all clerks.

The option that clerks should be able to decide if they want the redaction functionality was discussed. Mr. Kennedy stated that, because this is a node-by-node choice, JCIT can determine whether the clerks should decide if the functionality is turned on by office.

Justice Simmons asked for an overview of the redaction process. Mr. Derrick provided an overview: when the filer uploads the document, the filer can decide to

use the redaction functionality. The document goes through the redaction engine and the identified redaction candidates can be accepted or reviewed by the user. Tyler has both versions of the document – original and the redacted. The clerk can decide to load both versions into the CMS or load the redacted version only. The system default is to load the redacted version only. Mr. Kennedy added that re:SearchTX needs both copies – the original for the judge and redacted version for public view.

Ms. Price asked about the communication on configuring redaction for clerks. Mr. Derrick stated that Tyler conducted two joint presentations with OCA on reSearchTX changes including redaction in November that were recorded and posted to the website. Mr. Kennedy stated that a clerk redaction webinar will be scheduled.

Mr. Kennedy asked if the committee wants to turn on the redaction functionality for clerks by office. Justice Simmons suggested that the committee take time to understand what the needs are and to go forward with clerk choice for a period of time and then the committee can decide how to go forward.

Motion to have the default for redaction be off unless a clerk specifically requests that it be turned on. Additional education and training to be provided at the first opportunity. **Motion by Bob Wessels, second by John Warren – no opposition.**
Motion carries.

eFile Self Help Update - Justice Simmons asked about the usage of the eFile self-help programs. Mr. Derrick reported that usage remains about the same. Thirty-one interviews are available with six of those integrated with eFileTexas. Mr. Hawthorne asked about the long-term plan to improve the use of the self-help programs. Mr. Kennedy stated that there are issues with counties returning filings for correction because they require local forms in addition to the statewide forms.

Justice Simmons stated that she has concerns about the issue of standing orders and locally required forms and its impact on usage of self-help forms. Justice Simmons asked Judge Canales to find out how Bexar County handles the filings that require additional local forms. Mr. Hawthorne suggested that a notification be sent by the clerk's office to the parties with a link to the local requirements.

Justice Simmons will work with Judge Canales to determine what is happening in Bexar County to identify possible solutions to this issue. At the next JCIT meeting, a report on the findings will be provided.

B. re:SearchTX Update

Mr. Derrick provided an update on re:SearchTX: 6,417 total users of which 60 percent are licensed attorneys; 28 percent are registered users; and 12 percent are clerks and judges. Approximately \$2,000 of documents have been sold with

transactions for 148 counties and 3 appellate courts. 35% of the clerk offices with transactions have not yet signed the financial documents for the money to be deposited.

Mr. Kennedy asked how to improve communication with the clerks about re:SearchTX. Recommendations were provided regarding additional webinars and that communication on the webinars should come from OCA rather than Tyler. Mr. Warren discussed an issue regarding the need for clerks to set up the account with their county auditor/treasurer on how the money should be receipted.

Mr. Derrick provided an overview of user experience enhancements: eFileTexas payment methods are now available for use in re:SearchTX; home (landing) page improvements; streamlined attorney onboarding experience; and document sales page enhancements based on feedback received. An overview of an upcoming tool for clerks to run ad-hoc reports was also provided.

Mr. Derrick provided an overview of the outreach efforts to attorneys. He also provided information on the launch of the Research Plus, which is a premium service for legal professionals. Mr. Kennedy provided a list of premium functionalities: saved searches, organizational folders, alerts/notifications; in-document text searches, personalized filing feed; export search results; customized notes; data analytics and advanced reporting. Mr. Hawthorne stated his main objection is that in-document text searching is not part of the basic service.

Justice Simmons requested more communication about enhancements going forward. Mr. Derrick provided a 2019 National Base Development Roadmap. He also provided highlights of the feedback they have received. The top issue is that signed orders are not in the system.

Ms. Hopper brought up an issue about the management of judge roles within re:SearchTX and eFile. Mr. Kennedy stated that Tyler sent a list of the approximately 200 judges in the system and OCA is clearing out the individuals who are no longer judges.

C. Standards Committee – Bob Wessels

1. **Technology Standards Version 6** — Mr. Wessels provided an overview of the proposed changes: add eFile and re:SearchTX configurations for the intermediate courts of appeals; add standard document display names to eliminate filer confusion; and other minor changes. The biggest change is 4.7, which addresses the lead document issue. A discussion of the changes followed: the issue of allowed formats for proposed orders was discussed, and it was clarified that 4.6 applies to the Fourteen Courts of Appeals.

Ms. Hopper mentioned several issues regarding returning filings for redaction. Justice Simmons recommended that if the Standards Committee wants additional language in 4.7.2 to review and provide additional draft language to the next meeting.

Motion to adopt the revisions with two amendments: remove WORD from the matrix in 4.7.1 and any reference to the Courts of Appeals should be changed to the Fourteen Courts of Appeals. **Motion by Bob Wessels.**

A friendly amendment was made by Carlos Soltero to not disclose all cases of expunction or non-disclosure but the remainder of the list in 5.3.5 should be disclosed. **Motion by Carlos Soltero, amendment accepted by Bob Wessels – no opposition. Motion carries.**

2. **Discussion on adding Self-Represented Role and Permissions** — Mr. Kennedy provided information on the two methods for a self-represented litigant to access the documents in the case: automatic if the individual efiled a document and the document is accepted by the clerk, and manually set up by the clerk. If the filer is not an attorney, the system automatically assumes they are a self-represented litigant; however, anyone can file a document or letter into the case. After discussion, it was determined that this issue needs to be reviewed further.
3. **Discussion on changing the definition of “Attorney on the Case” to include all users associated with the attorney’s firm.**

Justice Simmons reviewed the issue of attorneys handling cases but are not permitted access to documents in re:SearchTX. re:SearchTX pulls from the party list not the service list to grant access to the documents. Once an attorney is added, it can’t be changed but additional attorneys can be added. This issue will be up for discussion at the next meeting along with how to provide access to paralegals.

The next meeting is scheduled for March 29, 2019. Justice Simmons adjourned the meeting at 12:47 pm.