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JCIT - Status Update

Terry Derrick
October 20, 2017

Project Timeline

254 County-Wide Engagements Over 12-Month Span

Pilot Begins
7/1/2017

Pilot Ends
12/31/2017

Launch Repository Model Statewide
1/1/2018

2017 | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun | Jul | **2018**
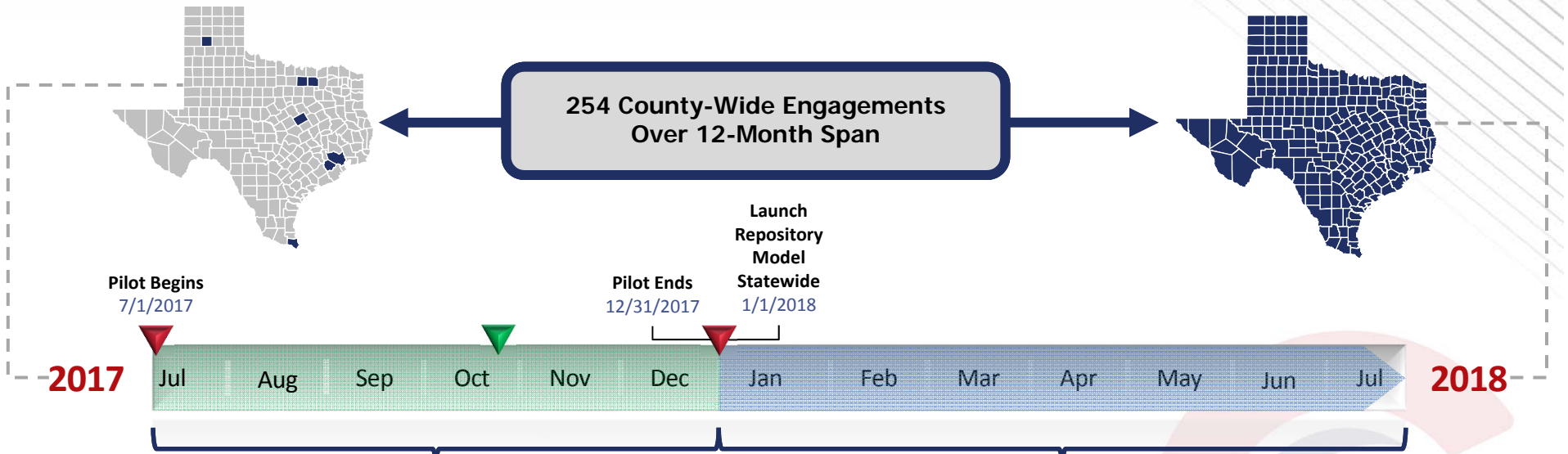
Phase 1 (Pilot Program)
- Consists of *7 county participants
  - 3 Large
  - 3 Medium
  - 1 Small
- Establishing and refining processes that will be implemented in the phase 2 (general adoption) rollout
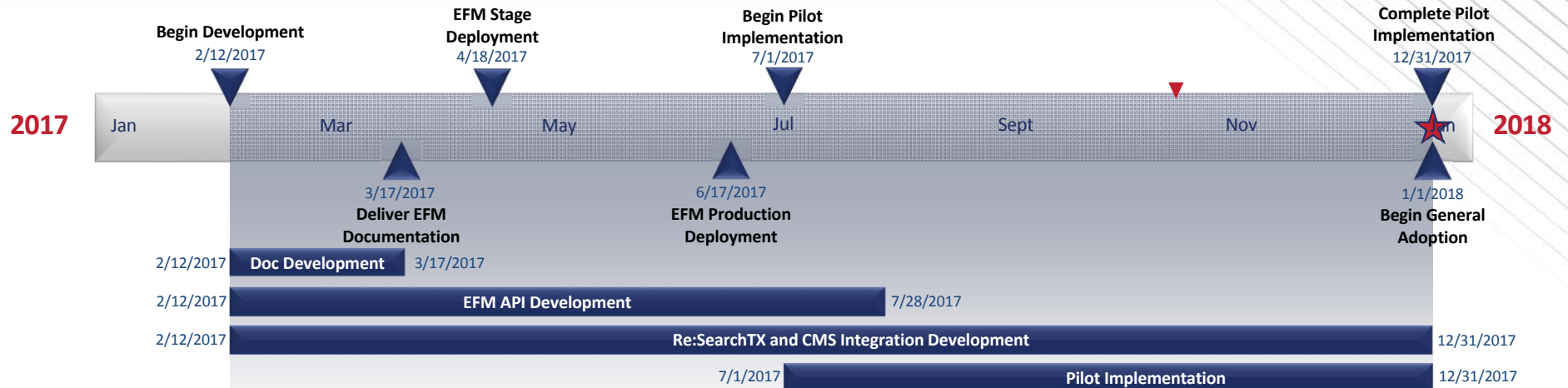- More pilot participants expected

Phase 2 (General Availability)
- Launch Repository model statewide 1/1/18
- Will include all remaining (non-pilot) counties
- Engagements include Clerks, Judges and Attorneys of Record
- Implement integration model for counties based on CMS vendor development completion of integration

2   ***Note**: Harris County on hold until late 2017

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Phase 1 (Pilot Program) Timeline

Begin Development
2/12/2017

EFM Stage Deployment
4/18/2017

Begin Pilot Implementation
7/1/2017

Complete Pilot Implementation
12/31/2017

2017 | Jan | Mar | May | Jul | Sept | Nov | Jan | **2018**

3/17/2017
Deliver EFM Documentation

6/17/2017
EFM Production Deployment

1/1/2018
Begin General Adoption

2/12/2017 — Doc Development — 3/17/2017

2/12/2017 — EFM API Development — 7/28/2017

2/12/2017 — Re:SearchTX and CMS Integration Development — 12/31/2017

7/1/2017 — Pilot Implementation — 12/31/2017

Key Integration Development Dates

	Lead Attorney Changes	Secure Cases	Retrieve Documents from CMS	Expunge Cases	Update Case Metadata from CMS	Secure Events and Documents	Add Non-eFiled Events and Documents
CMS Integrated	✔ 7/28	✔ 8/18	✔ 9/30	✔ 10/20	11/17	12/15	2/23
(Odyssey) CMS Integrated	✔ 7/3	✔ 8/18	✔ 9/30	✔ 10/20	11/17	12/15	2/23
Repository	✔ 6/17	✔ 3/1	✔ 7/3	✔ 3/1	11/17	✔ 3/1	2/23

Application Feature Enrichment

Stakeholder	Feature Availability Timeline - 2017			
	Q1 ✓	Q2 ✓	Q3 ✓	Q4
All	✓ Dashboards ✓ Search improvements	✓ Search by case / filing ✓ Direct filing into cases	✓ Tiff file support ✓ Feedback mechanism ✓ Find Cases / Filings by attorney number	• Case alerts • 508 compliance (Screen reader friendly)

Clerks	✓ Manual Tool to secure cases, filings and documents
	✓ Purchase history
		✓ Custom clerk contact Info
		✓ Manual tool set attorney
		✓ Case view log
			• CMS Integration:
			  ✓ Lead attorney changes
			  ✓ Secure cases
			  ✓ Get documents
			  ✓ Case metadata
			✓ Manual tool replace docs
			✓ Export case view log
			✓ Nightly case expungement
			  ➢ OCA provides Tyler a list of cases to expunge
				• CMS Integration:
				  ➢ Granular control of filing and doc security
				• Manual tool for editing case metadata
				• Manual tool for adding new events and docs
				• Auto redaction investigation

Lead Attorneys	✓ My cases ✓ Free access to docs on their cases			
Attorneys / Public	✓ Document preview before purchase ✓ Purchase history			• Shopping cart
Judges			✓ New Judge request page	
Admin	✓ Personas	✓ Feature config for personas ✓ Security rule tool & summary ✓ Preferred EFSP configuration ✓ Subscription configuration ✓ Grant user access tool for pilot users ✓ User log report	✓ Auto-generate case styles ✓ Attorney in good standing validation	• Account activation required page • Firm approval required page • Onboarding refinement

Limit Pilot Attorney Access to Specific Jurisdictions
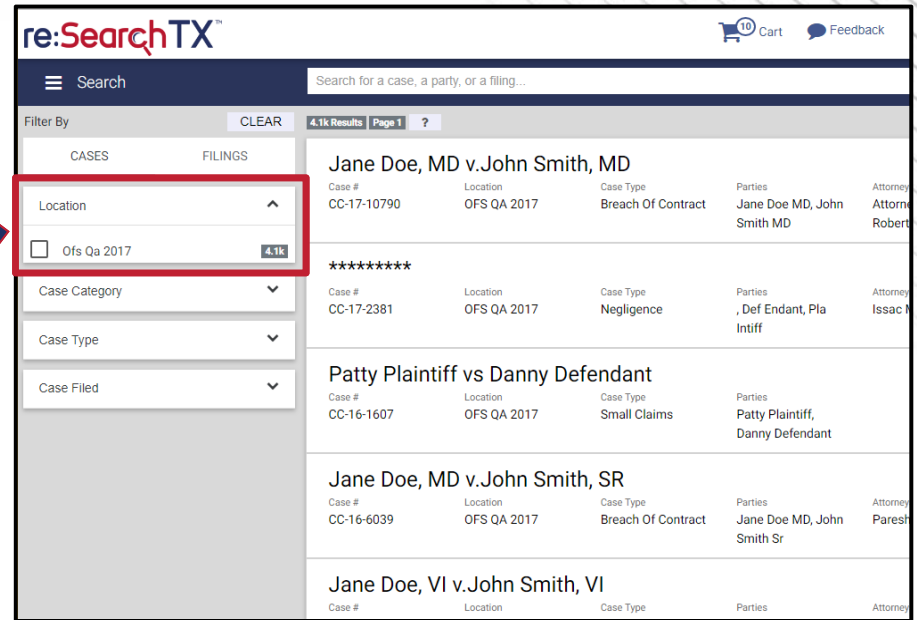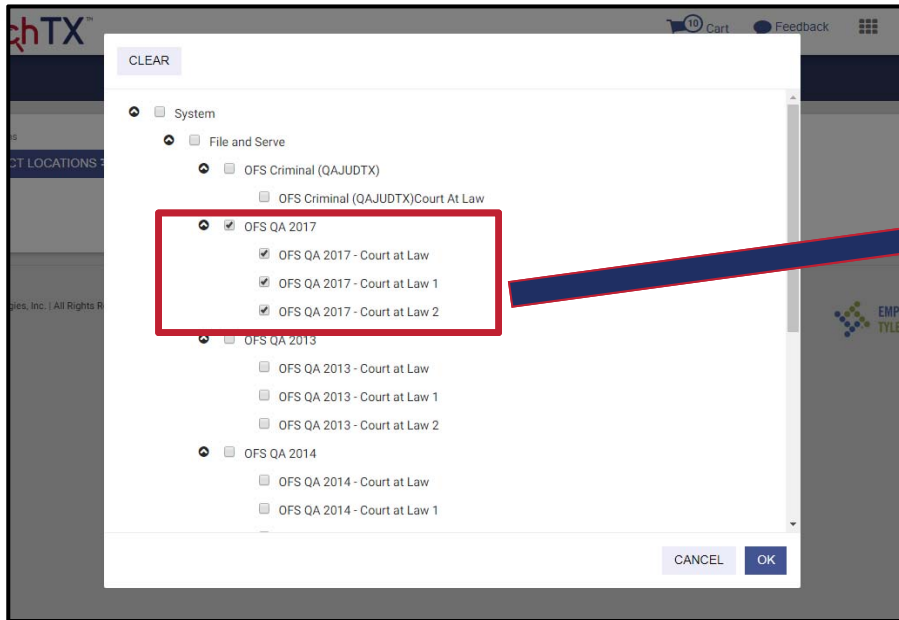
- Limits case access and locations available in the search filter
- Prevents unauthorized access to jurisdictions not participating in the pilot program
- Affords attorneys the opportunity to provide feedback

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Updated Omni Bar
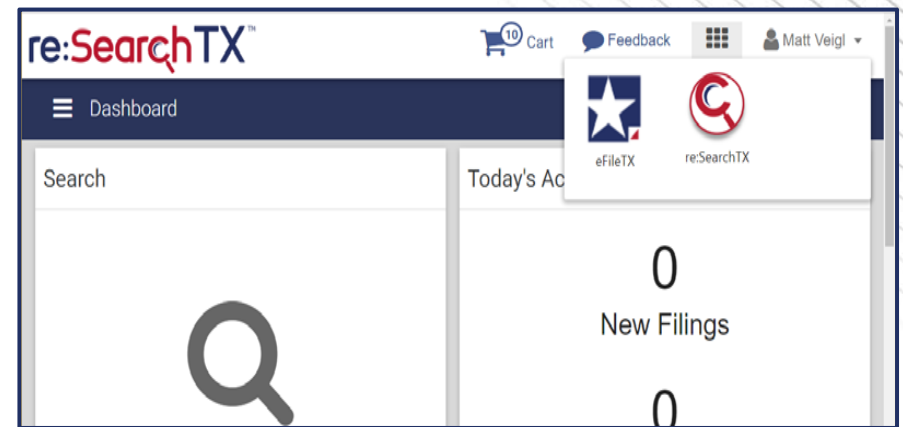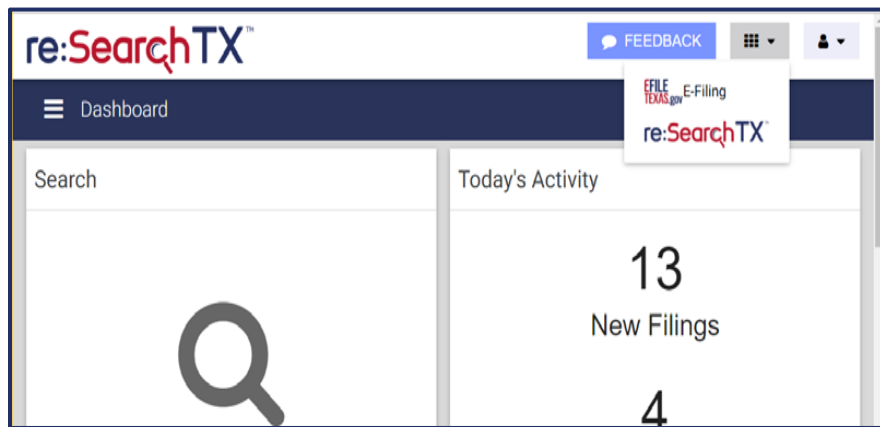
- Updated feedback icon / button
- Updated "9-box" horizontal view to allow for seamless experience between solutions
  - eFileTexas
  - Self Help – eFileTexas (SRL)
  - Modria (ODR)
- Updated user icon to include user's name
- New shopping cart icon

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Shopping Cart Progress

- Created Purchase Confirmation and Summary screen
- Provides hyperlinks to the PDFs after purchase transaction
- Provides the ability to view and print invoice

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Purchase History Created

- Purchase history for each order listed in a single location
- Ability to query and export results for additional data reporting options
- May be used to reconcile credit card statements or client billing

Next Steps

Complete functionality testing with pilot participants (Clerks)

Incorporate select Attorneys of Record into Pilot Program

Begin outreach to clerks for General Availability rollout

Begin exploring redaction opportunity with the OCA

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Questions

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