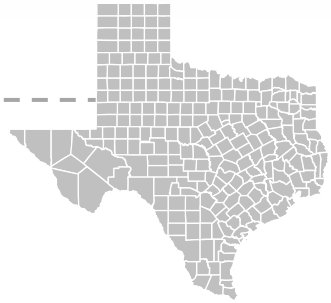
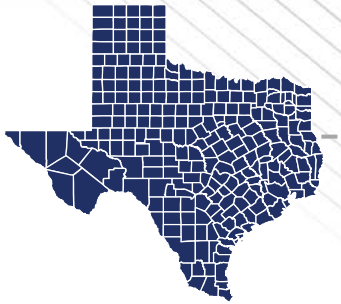
JCIT - Status Update

Terry Derrick
January 19, 2018

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

Integration Functionality Complete
4/1/2018

2017 Jul Aug Sep Oct Nov Dec Jan Feb Mar Apr May Jun Jul 2018

Phase 1 (Pilot Program)

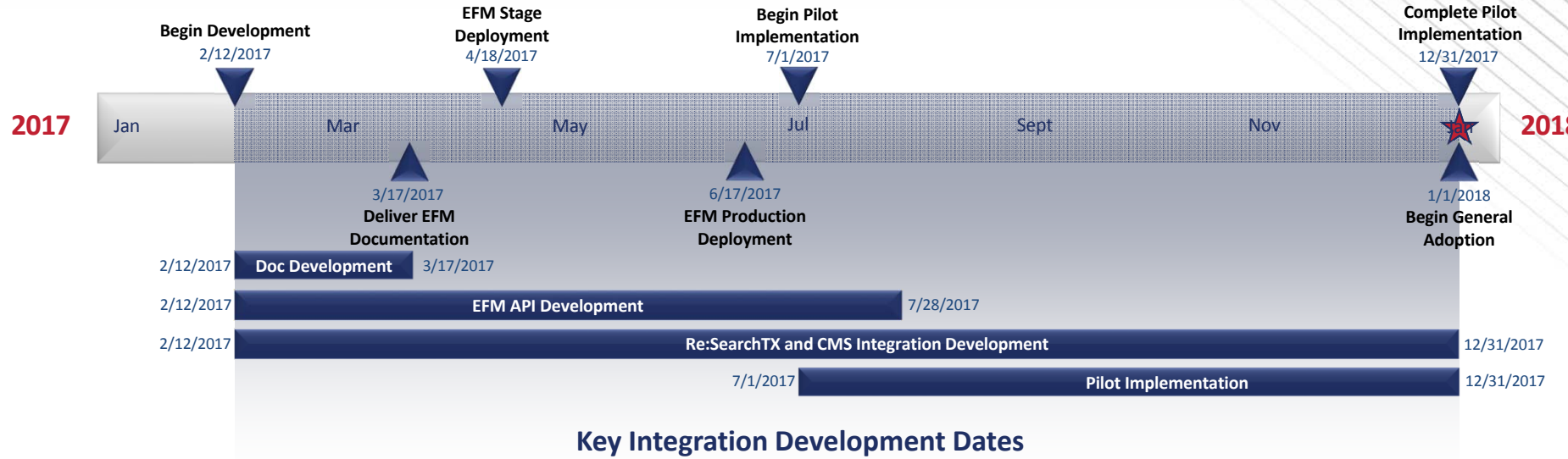
- Consists of *11 county participants
  - 3 Large
  - 4 Medium
  - 4 Small
- Establishing and refining processes that will be implemented in the phase 2 (general adoption) rollout
- More pilot participants expected

Phase 2 (General Availability)

- Launched Repository model statewide on 1/1/18
- Availability includes all counties across the state
- Availability broadened to encompass clerks and attorneys of record
- Implement integration model for counties based on CMS vendor's completion of integration development

*__Note__: Harris County on hold until early 2018

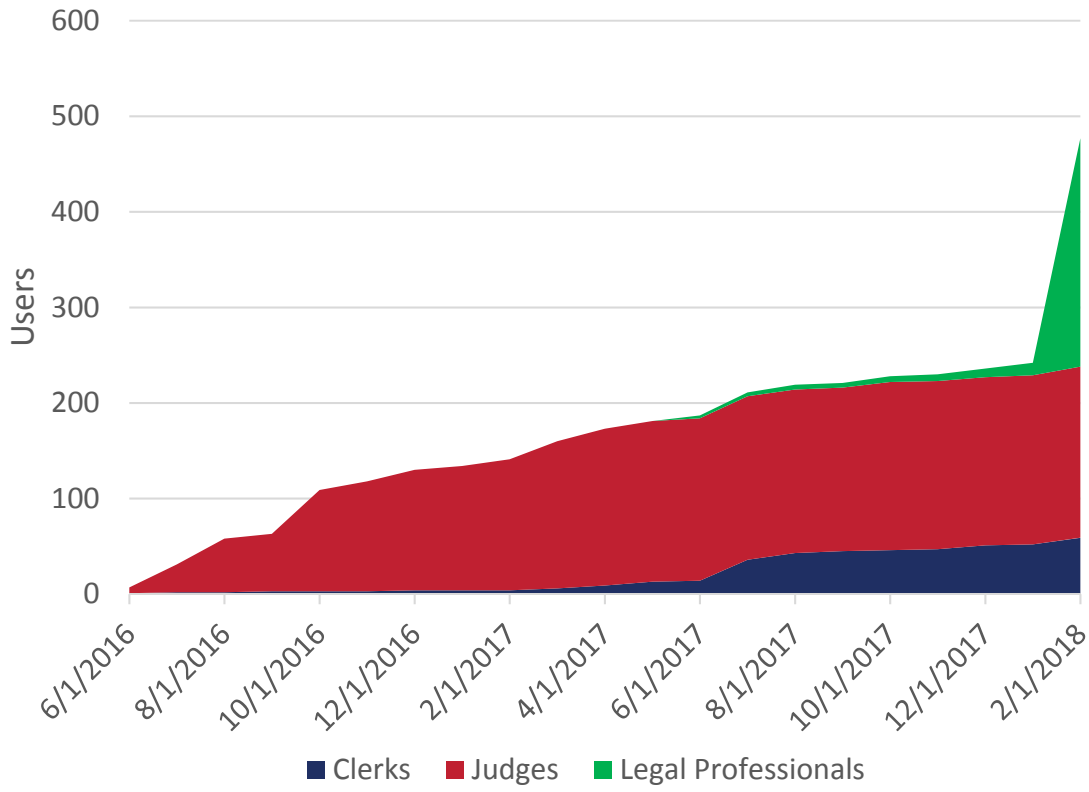
Phase 1 (Pilot Program) Timeline



Key Integration Development Dates

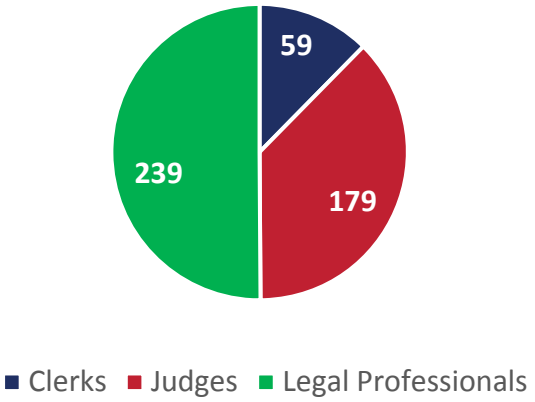
	Lead Attorney Changes	Secure Cases	Retrieve Documents from CMS	Expunge Cases	Update Case Metadata from CMS	Secure Events and Documents	Add Non-eFiled Events and Documents
CMS Integrated	✔ 7/28	✔ 8/18	✔ 9/30	✔ 10/20	✔ 11/17	3/23	3/23
(Odyssey) CMS Integrated	✔ 7/3	✔ 8/18	✔ 9/30	✔ 10/20	✔ 11/17	3/23	3/23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

Re:Search User Adoption



Summary

- 477 users as of 1/18/18
  - 59 clerks
  - 179 judges
  - 239 legal professionals
- 226 new legal professional users since 1/1/18
- User counts expected to grow steadily as more become knowledgeable of solution
- 104 non-attorney users have attempted to access re:SearchTX since 1/1/18



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Application Feature Enrichment - 2017

Feature Availability Timeline - 2017

Stakeholder	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	✓ Validate responsive design for mobile devices ✓ 508 compliance (Screen reader friendly) ✓ Feature preview ✓ Site analytics ✓ Persona-based help
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	✓ Manual tool for editing case metadata ✓ Manual tool to update filing/document security ✓ Auto redaction investigation
Lead Attorneys	✓ My cases ✓ Free access to docs on their cases			
Attorneys / Public	✓ Document preview before purchase ✓ Purchase history			✓ Shopping cart ✓ Document purchase expiration ✓ Attorney validation upon every login
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	✓ Auto-generate case styles ✓ Attorney in good standing validation	✓ Judicial partner roles ✓ Enhanced security rules ✓ Automated regression testing ✓ Account activation required page ✓ Firm approval required page

Application Feature Enrichment - 2018

Feature Availability Timeline - 2018

Category	Q1	Q2	Q3	Q4
User Experience	• Additional search type (attorneys) • Site analytics for feature previews	• Additional search types (parties and judges) • Advanced search • Site analytics for subscription purchases • Undo actions • Search suggestions • Add / remove all case docs to cart		
Clerk Tools & CMS Integration	• Hide editing tools for integrated court users • Case status • Manual court tool to add, edit and delete filings / documents • CMS Integration: ➢ Granular control of filing and doc security	• Improved error messaging on document retrieval • Historical data conversions for CMS solutions	• ROA integration • Recent / upcoming hearings	
Infrastructure	• Support tool enhancement • Onboarding refinement • Lead counsel loses access after set duration once case is “inactive” • Judge authentication • Automated regression testing V2	• Save doc purchases to cloud storage services • Batch download of documents • Single active session limits • Password expiration rule implementation • Subscription purchase options • Public registration onboarding	• Firm infrastructure ➢ Onboarding refinement ➢ Utilize OFS firm structure ➢ Firm cases page ➢ Firm purchases page ➢ Firm payment method ➢ Firm infrastructure	• My cases (SRLs)
Value-Added Services	• Email alerts (case and name) • Text alerts (case and name) • Alert preferences • Export search results	• Custom alerts • Folder enhancements ➢ Parties, attorneys, filings, locations, judges ➢ Nested folders ➢ Notes on saved items ➢ Folders shared with me • Legal analytics suite ➢ Attorney, firm and location insights	• Full text searching within docs • Firm collaboration ➢ Folders ➢ Saved searches ➢ Attorney, firm and location insights • My Firm page • Report on firm purchases	• Document library • Legal form library • Expert witness profiles

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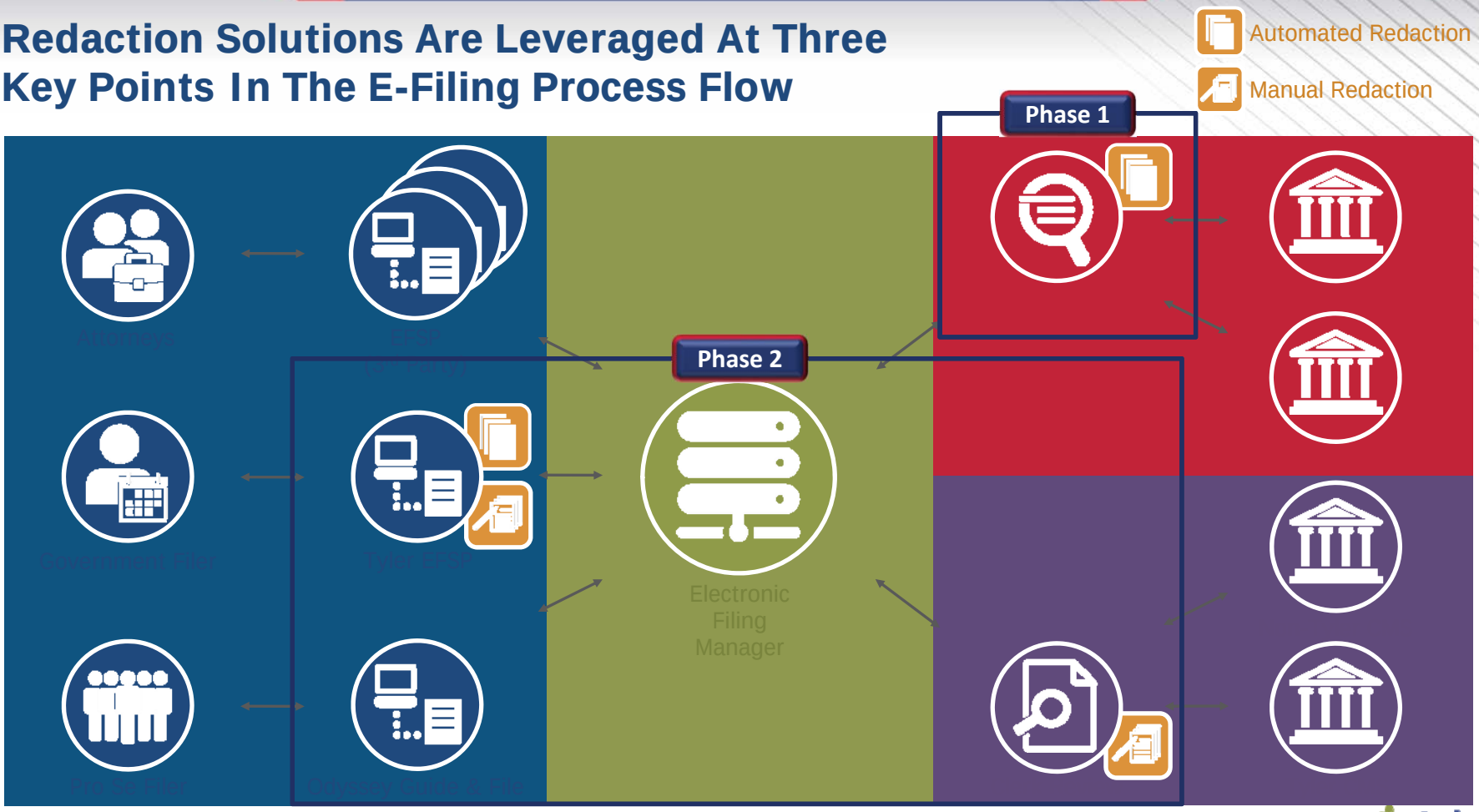
Solution Demonstration

Matt Veigl, re:Search Product Owner

Redaction Solutions Are Leveraged At Three Key Points In The E-Filing Process Flow



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Next Steps

- Establish integrations with various Case Management Systems
- Continue exploring redaction opportunity with the OCA
- Conduct steering committee meetings to obtain valuable feedback
- Agree on policy decisions that will help drive the program's direction

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Questions

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