

Combined Judicial Information Systems Council (JIFFY) and  
Online Access Subcommittee (OAS) Meeting  
Meeting Minutes  
Judicial Information Division  
Thursday, June 18, 2015  
9:07 - 12:03 p.m.

**Voting Members Present:**

Judge Karen Mitchell, Chair  
Judge Duane Castleberry  
Judge Sarah Singleton  
Tobie Fouratt  
Judge J. Miles Hanisee  
Brenda Castello  
Ian Bezpalko  
Lynne Rhys  
Judge Mark T. Sanchez  
Jim Noel  
Dennis Jontz

**Non-voting Members Present:**

Justice Petra Jimenez Maes  
Gregory Saunders  
Artie Pepin  
Renee Cascio

**Guests Present:**

Orlando Ulibarri (video)  
Robert Padilla  
Allen Lujan (video)  
Lydia Romero  
Colleen Reilly  
Stephanie Ives  
Barry Massey  
Weldon Neff  
Courtney Weeks  
Joey Moya  
Judge Maria Dominguez  
Justice Charles W. Daniels  
Judge Nan Nash (phone)  
Deborah Gutierrez-Torres (video)

**JID Staff Present:**

Grace Catanach  
Annie Hall  
Tim Elsbrock  
Ruben Rivera  
Tod Anderson  
Pat Mente  
Helen Miller  
April Sessions  
Jane Davenport  
Carlos Cordova  
Suzanne Winsor (video)  
Steve Harrington

**I. Approval of Agenda.** Judge Mitchell called the meeting to order at 9:07 a.m. The agenda was accepted as presented.

Judge Mitchell welcomed Justice Daniels to JIFFY.

## **II. Online Access Subcommittee.**

**Tyler Portal Presentation.** Judge Mitchell introduced Stephanie Ives, Senior Product Owner of E-solutions and Colleen Reilly, Client Executive of Tyler Technologies. Ms. Ives explained that Odyssey Portal is a web based platform that will be a solution for the next generation of public access and currently has the ability to provide all of the features in Odyssey Public Access (OPA) except for officer hearing scheduling. The purpose of the Portal is to have a platform that is much more user friendly and to allow for improved features to be uploaded to the site. The Portal allows users to search for cases and hearings; view information such as the register of actions, to retrieve documents and allows some communication with the courts. Depending on the products installed, it is possible to have direct communication from the Portal back to the Case Management System (CMS).

- **Features of Portal.** Portal allows for user self-registration, and the user can request the access that they want. Users can set up their own password, change and reset passwords from within Portal. Users can manage their own payment accounts, credit card information can be saved on file and users can view the transactional history of all documents they have purchased.
- **Administration of Portal.** Portal allows administrators to create a generic user group such as general attorney or justice partner and then every time an attorney or justice partner registers, they would be linked to one generic general attorney or justice partner. When an attorney, for example registers for access to Portal, there will be a queue that the Portal administrator goes to, which will have a list of all of the attorneys that have requested access. Claims are links back into Odyssey that will provide a default set up for example, to give all generic attorneys rights to certain information in Portal. Claims can also be used to provide elevated access for the active attorney of record on all of that attorney's cases. Reporting can be done at the admin level to provide tracking of which users or IP addresses have searched for particular documents or hearings. It also tracks unauthorized user logon attempts.

Configurations can be done at the admin level as to how cases and/or hearings are searched at the global site level, for any user group as well as an individual user. An example of this would be if JID administrators only wanted to allow anonymous users to search only criminal case types, JID would have the ability to limit anonymous users to criminal case types in Portal. Charging for access or documents can be dealt with at an individual jurisdiction level, individual court level or an individual node level. At present charges are per page, are transactional based and those fees go directly to the individual court charging for the document. Tyler is developing a shopping cart process and subscription model.

- Mobile Accessibility. Portal provides secure access on all mobile devices such as iPads, iPhones, and Android Windows. Portal has a single code base which allows it to look basically the same on a desktop as an iPhone.
- **Portal Features.** *Auto Acceptance* is a feature that can allow persons in different user groups to self-register for Portal without JID staff intervention. *Bulletin Board* allows NM Judiciary to provide information or links to users such as holiday schedules. *Smart Search* allows a user to search for cases, warrants or protection orders which can be controlled based on the user's rights and roles. Searching for hearings is available to those with elevated access such as the attorney of record. Right now, everything that exists in the current public access system is being migrated to Portal and from there new features will be added. If the public is allowed to pay for citations online (pre-adjudication), there is a feature for this option and the public can request extensions within this feature. Attorney Hearing Scheduling is another feature that can be turned on in one location and off at another location.
- Renee Cascio clarified that the present policy does not allow self-represented litigants to e-file or see any documents online. In File & Serve there is a waiver account for users who do not have to pay and the court staff is responsible for verifying that the user has been granted free process.
- Ms. Ives noted that when a user registers for Portal, there is a way to check and waive the document access charge for particular users. The plan is to create a consolidated sign-on process for attorneys. For proprietary users such Westlaw and Lexus, JID could create a generic user in Odyssey, and NM Judiciary could decide

what type of access to provide and what type of document security would be available to those users.

- **Portal Home Page.** The three features displayed at the top are web apps called portlets which include *Court Notification*, *Smart Search* and *Search Hearings*. For an anonymous user, *Smart Search* has a single search criteria box where a name, case number or other identification can be entered to find a person or specific case. It will show a person's name, the date the case was filed, the case type and location. To access the record a user would click on the link, which takes the user to the register of actions showing the file date, court location, the attorneys on the case, charge information, the events that have taken place in court and financial information. At present for the anonymous user, the PPI's that are masked include DOB (except for the year), social security number, street address, phone number and driver's license number. Which PPI's are shown can be modified without redaction based on different user group rights and rolls. If the user goes back to the home page, and clicks on the hearings portlet, the user can search for a hearing date based on defendant name, location, case number, business name, attorney name or bar number.
- **Registered User.** As a registered attorney or justice partner, a user is able to search cases and warrant information which can be manipulated based on the level of access granted to the user. When the user clicks on the submit button it will show the result set that is grouped by the party instead of by the case. This feature was created with justice partners in mind so that they are able to view all of the cases or warrants for a particular individual and provides the DOB and DL number. There is an icon built in that allows the user to view one or two preview pages of what a specific document contains, a page count and the price per page and a document subtotal for the cost of obtaining the document. The user can then click the document purchase button which takes the user to the page that gives the total and includes the document fee and the convenience fee. The extent of what a user is able to view on Portal is controlled by their logon.
- **Links to External Systems.** Links can be provided to external systems from when a user clicks on a specific case. Ms. Ives did not know if it could be turned on for example for all DWI cases or if end code systems such as municipal court DWI cases, could be brought into Portal.

- **Tyler Development Plan for 2015.** An anonymous role landing page is being developed with icons that tell the user to click here to go to the search portlet or click here to go to the hearing portlet which makes it much more user friendly on mobile devices. New features are being developed to allow the Integrated Criminal Justice (ICJ) clients to search for bonds and for jailings and this can be extended to include NM justice partners. Mug shots will be viewable and there will be a new Register of Actions (ROA) web application that can be launched through the web, within Odyssey, from Judge Edition and Clerk Edition. Faceted Searching is a new web app that Tyler is creating in Portal. It offers the user filtering Mechanisms to narrow down their search comparable to the way that Amazon does it with things such as size, color and brand. The attorney of record will be able to view some types of hearings that others would not have the ability to view such as pre-conference hearings. Watermark configuration is being developed so that the administrator can apply an overlay on documents that denotes that the pages that a user downloads have been downloaded and did not come from the court directly. Role based dashboards are another feature Tyler is building into Portal. When the attorney of record, justice partners or judges log in, all of their cases and hearings would be listed or displayed in a calendar view. Jurisdiction specific features are in the process of being constructed. By the fourth quarter (Q4), Tyler plans to have all of the functionality that currently exists in OPA, built into Portal. Advanced traffic option features will allow a user to request such things as an extension on the payment of a traffic citation or a payment plan or a hearing in lieu of paying the citation.
  
- Renee Cascio pointed out that there needs to be a use agreement that requires an attorney to notify JID if they leave one agency and go to another agency or go into private practice.
  
- **Tyler Development Plan for 2016.** A planned feature in 2016 is to allow agencies and justice partners to self-administer their users. Providing the online requests for certified documents which go to the court, it can be mailed or the user can pick it up at the courthouse even if the user does not have access to documents online. Electronic plea agreements, online supervision payments, online compliance check-in and criminal e-filing are in the planning stages for 2016.
  
- If a correction facility is publishing their roster of inmates online, there could be a link provided from that court information section so that it could be accessed in

Portal. The features are not linked to specific Odyssey versions the majority of the time, except for the appellate case search and appellate opinion search which are dependent on version 2014.2.

- Judge Mitchell observed that if NM Judiciary were to implement Portal immediately that no functionality would be lost that is currently in OPA except for officer scheduling.
- Artie Pepin added that Portal would allow NM Judiciary to offer justice partners access to documents, which is not available through OPA.
- Ms. Cascio explained that OPA could continue to operate exclusively for officer scheduling. It is also possible in Portal, to allow attorneys access to all of the documents in their cases, but not in any other cases.
- Colleen Reilly clarified that payment for Portal is included in the contract with NM Judiciary to continue to improve the Tyler product and to take advantage of technology as it matures. Portal is considered a part of that maturity. Portal is the evolution of OPA and is part of general maintenance.
- Judge Mitchell stated that the Online Access Subcommittee (OAS) needs to consider what access they would want to give to different categories of users and the policy question of what elements NM Judiciary will charge the user. Judge Mitchell mentioned that JIFFY will recommend to the Court how much to charge for online copies of documents and that fee would still go to the court, but there might be a service fee that would go to JID for the maintenance of the product.
- Justice Maes proposed that users pay a substantial fee for online copies to offset the cost of the technology to implement and maintain Portal and the fee could go into an account for hardware refresh at JID. There is no cost to the individual courts for online documents either in equipment or staff resources.
- Mr. Pepin explained that the payments could go directly to the courts and then the funds would then be appropriated to the AOC for spending under the direction of JIFFY and other committees for one time purchases. The only online document access that can be allowed at this time without redaction is to justice partners who are not charged and attorneys. Judge Mitchell noted that Portal gives NM Judiciary

the ability to limit the access that attorneys and justice partners have to cases in which they have a vested interest.

- Judge Mitchell recommended that the members of OAS consider whether it is appropriate to switch to Portal and if so, a timeline for when that should take place and what functionality to recommend to JIFFY and the Supreme Court.
- Ms. Cascio explained that at this time, a public user will not be able to see documents in Portal but will still be able to request through Portal a copy of a document. This will be possible in 2016 and there needs to be a separate fee for that. The court will have to make a copy and send it to the user and this may require a new fee structure.

***Action Item: Joey Moya and Weldon Neff to provide the statutes explaining the processes that apply to payment of court documents to OAS at the July 15, 2015 meeting.***

***Action Item: Renee Cascio and JID staff to prepare for OAS with a list of the case types and a user classification list denoting the types of cases that each group should have access to, for the July 15, 2015 meeting.***

***Weldon Neff to contact all of the CEOs of the district courts and request that they furnish Mr. Neff with total funds collected at their court for document copies in the years 2012, 2013 and 2014 to be presented at the August 20, 2015 JIFFY meeting.***

**III. Project Status Reports.** Presentations will resume at the next JIFFY meeting.

#### **IV. Budget and Revenue.**

**JID Revenue Pipeline.** Lydia Romero presented the “*JID Revenue Pipeline*” and reported that (p1) the SCAF revenue was slightly higher than this time last year. The projected fund balance (p3) has gone up from last year and Oscar Arevalo is projecting 1.2 million for this year’s collections up from \$800,000 last year. There was a Realignment of Budget (ROB) (p5) of \$78,000 from contractual, to pay for some equipment for BCMC. Collections from Red Light Camera (p7) were high from Rio Rancho. Despite the fact that there were no funds collected from Santa Fe or Las Cruces for most of the year, Red Light Camera funds reached the projected goal for the year.

Mr. Pepin reported that the contract with Tyler goes through the end of 2015. AOC/JID will meet with Tyler for an accounting report (p8) on e-filing revenue sharing with New Mexico.

***Action Item: Oscar Arevalo to do a mini seminar for the Members of JIFFY at the September meeting on how to read the “JID Revenue Pipeline”.***

**JID FY17 Preliminary Budget Request.** Greg Saunders referred to the handout entitled “JID FY17 Request Overview”.

**FTE.** One FTE is being requested for Jury Maintenance. There is a request for six new FTE’s for JID consisting of one Statistician or Data Base Administrator (DBA) and two Business Analysts (BA) in the Business Analyst Group. In Operations, two positions are being requested for front end help desk. Under Development, there is a need for a Forms Developer. The total cost would be approximately \$650,000 and \$200,000 would come out of SCAF to go into General Fund.

**General Fund Expansion.** The request is for a \$500,000 increase in telecom costs, so that the funds currently coming from SCAF could be freed up for other initiatives. An overall maintenance increase is requested for VNOC equipment and general operations in the amount of \$185,000. The plan is to do a computer refresh every three years, however moving to new versions of Odyssey which may require other upgrades will have to be done in addition to the three year refresh. Next year the cost will be \$452,000, which is not in JID’s budget, which breaks down to approximately \$800 per employee. Specialized training for IT staff is critical and that request is for \$50,000.

**Computer Enhancement Fund.** The IT plan C-2 requests are for VNOC court upgrades of \$265,000, implementation of the RCS System for Fiscal Services \$220,000, server and server software upgrades totaling \$275,000 and the Cash Remediation project in the amount of \$100,000.

- Justice Maes stated that at the Chief Judges Council (CJC) retreat in May there were three budget priorities. The first priority was to implement the new pay scale for judicial employees. The second priority was to limit the courts to a total of 1.5 million dollar request in base budgets, however the Supreme Court or AOC could ask for a different amount, with justification. Justice Maes is not sure that the 1.5

million dollar base budget included the new FTE's requested by JID. If JID is not adequately funded, the courts will not be able to function properly.

- There was discussion and consideration of possibly moving the computer refresh request into Special Appropriations and that request would be the only AOC request for a special appropriation.
- Mr. Pepin informed the members of JIFFY that on June 17, 2015, the Supreme Court directed JIFFY to form a subcommittee charged with preparing a sustainable and comprehensive plan for insuring that each entity has the necessary computer and technology resources to carry out its core functions. The plan may include strategies for conducting regular court technology audits as well as budgeting and funding proposals.
- Judge Mitchell suggested that the new subcommittee together with JIFFY must decide how IT will be funded in the future. Will it be through SCAF, the general fund through the AOC to JID or does it need to be more dispersed with a long term plan for the various entities? Judge Mitchell asked Chief Justice Vigil to allow JID time at CJC in July 2105 to explain the JID budget request as approved by the AOC, answer some other questions and provide the chief judges with their own individual inventory list to include the age of the computers.
- Mr. Saunders explained that the decision as to which computers are due to be replaced will be decided based upon the type of machine, the age of the computer, JID's ability to sustain it and ultimately Odyssey and the version upgrades.
- Jim Noel added that when courts go through the process of obtaining new computers, they need to meet the requirements that are being driven by Odyssey and other applications and because those applications are centralized through JID, Greg Saunders and the JID staff should set standards and specifications for new equipment that is purchased.
- Justice Maes encouraged JIFFY members to support Mr. Pepin and Mr. Saunders on the FY17 requests such as moving the telecom increase from SCAF into the general fund, funding the maintenance increase and the computer refresh.

*Action Item: Oscar Arevalo to discuss what the statutory authority of SCAF covers at the August or September JIFFY meeting.*

**Jim Noel moved to support the JID request as presented on the handout entitled “JID FY17 Request Overview”. Judge Sanchez seconded.** After some discussion and questions concerning how the FY17 funding requests will be presented, Judge Mitchell clarified that JIFFY would prefer for the FY17 funding requests to be funded the way they are listed on the handout. **The motion was amended to remove the last line on the handout “Special Appropriations? None”. No opposition noted. Motion Carried.**

## **V. JIFFY Subcommittee Activities.**

**Judges User Group.** Judge Singleton stated that OJUG did not meet in June in order to allow the Habeas Corpus Subcommittee to prepare their presentation.

**Forms Committee.** Judge Mitchell reported that the Forms Committee met and worked on administrative forms that should appear in Odyssey in the near future. The committee will be looking at contempt and probation violation forms at the next meeting.

**Data Standards.** Judge Mitchell stated that the first Data Standards meeting will take place on July 13, 2015 and there is a handout that lists all of the members of the committee. The committee includes district court judges and clerks as well as magistrate court judges and clerks. There will be a review of the data standards that exist and JID has a priority list for the committee to address.

## **VI. CIO Report.** Greg Saunders

**Staffing Changes.** Tod Anderson and Ruben Rivera are new employees that have joined the Development team. Recruitment continues for a Senior Developer position. JID is interviewing today for Financial Administrator to double fill, Leslie Bishoff’s replacement has been hired and will double-fill for two weeks.

**E-payments.** Since February 15 the funds collected total one million fourteen thousand five hundred.

**Supreme Court Implementation.** The implementation took place on June 1, 2015 as planned. E-payments is held up, however an E-filing pilot is planned with the AG and PD and then and mandatory E-filing is planned for some time after August 1, 2015.

**Magistrate Scanning.** The contract is signed and there are thirteen counties that will be implemented starting with Dona Ana. A grant totaling \$255,000 from DOT will be used to implement magistrate court document imaging. AOC/JID must pay the expenses up front and be reimbursed by DOT.

**Odyssey Upgrade.** Sunday June 21, 2015 there will be a minor Odyssey version upgrade which should not impact any of the judiciary.

**IT Purchases.** JID will present a draft version of a new policy for IT purchases to JIFFY in July. This will assist courts in going forward with IT related purchases.

**Road Map Meeting.** A road map meeting took place with Tyler and JID explained what NM Judiciary will be doing for the next few weeks, months and years. Some of the plans are contingent on an upgrade from V13 to V14. V14 upgrade will not occur for at least six months from the time JID decides to move to V14. Appellate courts will not be able to go on until after V14 has been implemented. Tyler was asked to produce a road map for JID to include things such as costs, contingencies and what order things have to happen, to present to JIFFY at the July meeting.

**Website Contract.** The contract to renovate the judiciary website including an intranet is ready for review.

**Email of Warrants.** JID has been informed that documents are transiting the network in email form. These documents may contain personal identifiers (PII). JID is researching processes that allow this function to occur but not through the email system. Sometime in the future, JID will present that option. At that point, JID would ask that no judiciary entity be allowed to email warrants.

**Security Awareness Training.** JID found it to be more cost effective to pay for the security awareness training than to ask the courts to pay individually. The training will begin at the end of July.

## **VII. Additional Attachments.**

**Regional Field Support Information.** Mr. Saunders stated that CJC had asked that JID provide a list by region and by court of the JID Client Team Field Staff including each of the field staff's contact information. This will be presented tomorrow at CJC.

**VIII. Future Meetings.** The next meeting will be held on July 16, 2015 9:30 a.m. at the Judicial Information Division in Santa Fe.

**IX. Adjourn.** Judge Mitchell adjourned the meeting at 12: 03 p.m.