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## FACT SHEET

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### Phoenix Program

The Phoenix Program is a statewide technology initiative that provides transition assistance to the courts moving from county stewardship to the judicial branch's financial and human resources (HR) systems as a result of Assembly Bill 233. The project is being managed by the Administrative Office of the Courts (AOC), Trial Court Administrative Services Division in Sacramento with the participation of the AOC Finance, Human Resources, and Information Services Divisions in San Francisco.

#### History of the Phoenix Program

The Lockyer-Isenberg Trial Court Funding Act of 1997 (AB 233) was enacted in the fall of 1997 as a means of ensuring equal access to justice throughout California. This law, which became effective on January 1, 1998, shifted the responsibility for funding the trial courts from the counties to the state.

Historically, most courts' accounting, personnel, and other administrative services have been provided by counties or outsourced to vendors. Now, due to the implementation of AB 233, many courts are faced with assuming the task of performing their own human resources- and finance-related functions, but most lack the experience and resources to accomplish this successfully. Many counties that had once provided accounting and human resources support to the trial courts prior to state funding have announced significant fee increases to continue these functions, while others have notified their courts that they will no longer perform these services, leaving the courts in a serious predicament. The Phoenix Program was launched as a major statewide effort to fill this services gap for the courts.

#### Phoenix Components

Phoenix comprises two major components: the Phoenix Financial System and the Phoenix Human Resources System. SAP is the internationally recognized financial systems software that was selected to host the trial courts' financial and human resources management systems.

The **Phoenix Financial System** provides a diverse range of services, including accounting and financial services, a centralized treasury system, trust accounting services, and core business analysis and support.

Implementation of the statewide trial court financial system and centralized treasury will enable the courts to produce a standardized set of monthly, quarterly, and annual financial statements that comply with existing statutes, rules, and regulations. The objectives of the system are to:

- Standardize the accounting and business functions;
- Maximize investment opportunities and timely use and disbursement of cash;
- Ensure uniformity of financial record keeping and maintenance;
- Provide consistency of data and quality of management information; and
- Provide judicial partners with comprehensive financial information on a regular and timely basis.

The **Phoenix Human Resources System** is the human resources/payroll component built on the SAP platform that runs the Phoenix Financial System. The goal is to configure a tool suitable for use by all trial courts to support their human resources management and administration needs. This HR tool has been deployed to seven courts to date.

This Phoenix component was developed in collaboration with human resources professionals from the trial courts and the AOC. Trial court HR professionals acted as subject matter experts on the development and configuration of the tool, with the AOC providing project management expertise and oversight of implementation.

#### Implementation

In December 2002, the Phoenix Financial System was successfully piloted in the Superior Court of Stanislaus County and has since been implemented in all 58 superior courts. This statewide financial management system uniformly employs the following modules:

- General Ledger
- Cost Accounting
- Materials Management
- Accounts Payable
- Accounts Receivable

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- Project Accounting
- Trust Accounting
- Business Information Warehouse
- Grants Management
- Fixed Asset Management

The Phoenix HR System will benefit all courts by:

- Providing a consistent tool to maintain human resources data;
- Integrating human resources and finance systems; and
- Eliminating non-value-added operational functions, such as duplicate data entry.

While each court may have unique requirements that will be addressed during deployment (e.g., court-specific benefit plans or payroll processing requirements), the goal will be to identify and incorporate into the system those common data and process requirements. The overall SAP Phoenix HR System modules include:

- HR Structure
- Personnel Administration
- Organizational Management
- Benefits
- Time Management
- Payroll
- Employee and Manager Self-Service

### Objective

The AOC's goal is to provide a uniform process of financial management and human resources services to all of the trial courts in California. Although the deployment of the Phoenix Financial System has been completed, the deployment of the Phoenix HR System is still in its early stages, with implementation in a total of seven superior courts to date. Additional deployments were suspended in fiscal year 2010–2011 due to the state of California's budget crisis; however, the AOC anticipates they will resume when resources become available.

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