

A. CMS Data Exchanges

Summary: Develop Standard CMS Interfaces and Data Exchanges with Critical State Justice Partners

Project Origin: Court Information Technology Manager’s Forum (CITMF) list #1, Tactical Plan; Jake Chatters and Justice Bruiniers recommendation

Alignment to Tactical Plan: Develop Standard CMS Interfaces and Data Exchanges, p. 37

Expected Outcomes	Est. Complete
1. Identify specific justice partners exchanges required and court interface needs.	
2. Establish standards for, and define where feasible, common exchange(s), consistent with national standards, and secure methods to share those exchanges for courts wishing to implement them.	
3. Work with CMS vendors to facilitate timely implementation of standardized exchanges where needed, consistent with existing court deployment schedules.	
4. Develop governance processes to ensure continuing development and maintenance of statewide data exchanges established, and to maintain on-going communication and cooperation with our justice partners and CMS vendors in this effort.	

Is outcome a rule or forms change? Yes []

Assignment:

[] Projects Subcommittee

[] Rules Subcommittee

[] Joint Appellate Tech Subcommittee

[] This project would benefit from a **workstream** led by an Executive Sponsor

Identify staffing resources (i.e., council, court, committees, subject matter expertise, partners):

Priority

[]

P1. Must be done (e.g., legal mandate, JCTC/council directive, urgently needed to remedy a problem causing significant cost or inconvenience to courts or the public, other urgency).

P2. Should be done.

B. Security Framework

Summary: Document and Deploy Court Information Systems Security Policy Framework

Project Origin: Court Information Technology Manager’s Forum (CITMF) list #2, Tactical Plan

Alignment to Tactical Plan: Court Information Systems Security Policy Framework, p.45

Expected Outcomes	Est. Complete
1. Finishing the work that was started on the Court Information Systems Security Policy Framework.	
2. Initially deploying the framework at a select group of pilot courts.	
3. Deploying the framework at the remaining courts as needed.	

Is outcome a rule or forms change? Yes []

Assignment:

- [] Projects Subcommittee
- [] Rules Subcommittee
- [] Joint Appellate Tech Subcommittee
- [] This project would benefit from a **workstream** led by an Executive Sponsor

Identify staffing resources (i.e., council, court, committees, subject matter expertise, partners):

<p><u>Priority</u></p> <p>[<input type="checkbox"/>]</p>	<p>P1. Must be done (e.g., legal mandate, JCTC/council directive, urgently needed to remedy a problem causing significant cost or inconvenience to courts or the public, other urgency).</p> <p>P2. Should be done.</p>
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C. "Open Source" Sharing

Summary: Establish an "Open Source" Application-Sharing Community

Project Origin: Discussion topic at CEAC, Court Information Technology Manager's Forum (CITMF) list #3, Tactical Plan

Alignment to Tactical Plan: Establish an "Open Source" Application-Sharing Community, p.36

Expected Outcomes	Est. Complete
1. Integration of Open-source software governance into the existing governance model.	
2. Repository for making applications available.	
3. Initial library of applications gathered from within the branch.	
4. Communication mechanism for promoting the repository.	

Is outcome a rule or forms change? Yes []

Assignment:

- | | |
|--|--|
| <input type="checkbox"/> Projects Subcommittee | <input type="checkbox"/> This project would benefit from a workstream led by an Executive Sponsor |
| <input type="checkbox"/> Rules Subcommittee | |
| <input type="checkbox"/> Joint Appellate Tech Subcommittee | |

Identify staffing resources (i.e., council, court, committees, subject matter expertise, partners):

<p><u>Priority</u></p> <p>[<input type="checkbox"/>]</p>	<p>P1. Must be done (e.g., legal mandate, JCTC/council directive, urgently needed to remedy a problem causing significant cost or inconvenience to courts or the public, other urgency).</p> <p>P2. Should be done.</p>
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D. E-Filing Service Provider Evaluation

Summary: E-filing Service Provider (EFSP) Selection/Certification

Project Origin: Court Information Technology Manager’s Forum (CITMF) list #4, Tactical Plan

Alignment to Tactical Plan: E-filing Service Provider (EFSP) Selection/Certification, p.31

Expected Outcomes	Est. Complete
1. Assess merits of approaches/models and recommend path forward.	
2. Secure pilot funding, as needed.	
3. Develop EFSP evaluation criteria.	
4. Develop uniform contracts (CMS and/or EFSP, depending upon model).	
5. Identify pilot project participant courts.	
6. Initiate pilot program at one or more courts.	

Is outcome a rule or forms change? Yes []

Assignment:

[] Projects Subcommittee

[] Rules Subcommittee

[] Joint Appellate Tech Subcommittee

[] This project would benefit from a **workstream** led by an Executive Sponsor

Identify staffing resources (i.e., council, court, committees, subject matter expertise, partners):

Priority

[]

P1. Must be done (e.g., legal mandate, JCTC/council directive, urgently needed to remedy a problem causing significant cost or inconvenience to courts or the public, other urgency).

P2. Should be done.

E. E-Filing Deployment

Summary: Roadmap and Implement an E-Filing Deployment Strategy

Project Origin: Tactical Plan; 5b is from Jake Chatters (aligns with 5a)

Alignment to Tactical Plan: E-Filing Deployment, p.34

Expected Outcomes	Est. Complete
1. Refine and distribute an e-filing deployment roadmap to aid courts in preparing for implementation.	
2. Survey courts to identify both the current state of e-filing and those courts with current interest and capability to implement e-filing.	
3. Identify funding mechanisms (e.g., court funded and/or user fee supported) for branch and local e-filing initiatives.	
4. Create and publish an e-filing implementation plan consistent with level-of-readiness criteria and available funding.	
5a. Assess viability/desirability of a statewide filing portal for at least some e-filing functionality (e.g., self-represented litigants) and for e-delivery to those courts without e-filing capability. Develop plan accordingly.	
5b. Review and recommend model for e-filing delivery, specifically whether to continue to limit state level involvement to the promulgation of standards or whether to implement an e-filing hub similar to that used in Texas.	

Is outcome a rule or forms change? Yes []

Assignment:

[] Projects Subcommittee

[] Rules Subcommittee

[] Joint Appellate Tech Subcommittee

[] This project would benefit from a **workstream** led by an Executive Sponsor

Identify staffing resources (i.e., council, court, committees, subject matter expertise, partners):

Priority

[]

P1. Must be done (e.g., legal mandate, JCTC/council directive, urgently needed to remedy a problem causing significant cost or inconvenience to courts or the public, other urgency).

P2. Should be done.

F. E-Filing Summit

Summary: Organize and Sponsor Branch Summit on Court E-Filing

Project Origin: Carryover from Annual Agenda 2014 #7; possibly a major activity of other e-filing initiatives

Alignment to Tactical Plan: ?? EFSP Selection/Certification, p.31 E-Filing Deployment, p.34

Expected Outcomes	Est. Complete
1. Consult with the CEAC, TCPJAC, and court CIOs (e.g., through the CITMF) to gauge and validate interest and need in an E-Filing Summit, Submit proposal to JCTC for approval.	
2. Subject to approval and in cooperation with the JCTC, convene a branch summit on e-filing, including participation by non-branch stakeholders to discuss standards, best practices, opportunities for expansion, and the path forward for the branch.	

Is outcome a rule or forms change? Yes []

Assignment:

[] Projects Subcommittee

[] Rules Subcommittee

[] Joint Appellate Tech Subcommittee

[] This project would benefit from a **workstream** led by an Executive Sponsor

Identify staffing resources (i.e., council, court, committees, subject matter expertise, partners):

Priority

[]

P1. Must be done (e.g., legal mandate, JCTC/council directive, urgently needed to remedy a problem causing significant cost or inconvenience to courts or the public, other urgency).

P2. Should be done.

G. SRL E-Services Portal

Summary: Evaluate Feasibility of Establishing a Branch SRL E-Services Portal

Project Origin: Carryover from Annual Agenda 2014 #4, but inserted major tasks from Tactical Plan

Alignment to Tactical Plan: Implement a Portal for Self-Represented Litigants, p.29

Expected Outcomes	Est. Complete
1. Determine and validate both litigant needs (including LEP litigants) and court requirements.	
2. Identify available existing technology and infrastructure components to leverage.	
3. Identify information resources to assist litigants.	
4. Identify pilot project participant courts.	
5. Identify potential vendors and costs/RFP for portal development.	
6. Initiate pilot program at one or more courts.	

Is outcome a rule or forms change? Yes []

Assignment:

[] Projects Subcommittee

[] Rules Subcommittee

[] Joint Appellate Tech Subcommittee

[] This project would benefit from a **workstream** led by an Executive Sponsor

Identify staffing resources (i.e., council, court, committees, subject matter expertise, partners):

Priority

[]

P1. Must be done (e.g., legal mandate, JCTC/council directive, urgently needed to remedy a problem causing significant cost or inconvenience to courts or the public, other urgency).

P2. Should be done.

H. Next Generation Hosting Strategy

Summary: Transition to Next-Generation Branchwide Hosting Model

Project Origin: Court Information Technology Manager’s Forum (CITMF) list #5, Tactical Plan

Alignment to Tactical Plan: Transition to Next-Generation Branchwide Hosting Model, p.43

Expected Outcomes	Est. Complete
1. Complete needs assessment, develop implementation recommendations, and determine the necessary funding changes.	
2. Finalize product, service, and maintenance contract procurement with vendor partners.	
3. Publish transition project plan.	
4. Decommission old services and implement new services in alignment with the needs assessment and transition plan.	

Is outcome a rule or forms change? Yes []

Assignment:

- | | |
|--|--|
| [<input type="checkbox"/>] Projects Subcommittee | [<input type="checkbox"/>] This project would benefit from a workstream led by an Executive Sponsor |
| [<input type="checkbox"/>] Rules Subcommittee | |
| [<input type="checkbox"/>] Joint Appellate Tech Subcommittee | |

Identify staffing resources (i.e., council, court, committees, subject matter expertise, partners):

<p><u>Priority</u> [<input type="checkbox"/>]</p>	<p>P1. Must be done (e.g., legal mandate, JCTC/council directive, urgently needed to remedy a problem causing significant cost or inconvenience to courts or the public, other urgency). P2. Should be done.</p>
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I. Disaster Recovery Framework

Summary: Court Disaster Recovery Framework and Pilot

Project Origin: Court Information Technology Manager’s Forum (CITMF) list #6

Alignment to Tactical Plan: Court Disaster Recovery Framework and Pilot, p.47

Expected Outcomes	Est. Complete
1. Model disaster recovery requirements, standard recovery times, and priorities for each of the major technology components of the branch.	
2. A disaster recovery framework document that could be adapted for any trial or appellate court to serve as a court’s disaster recovery plan.	
3. A plan for providing technology components that could be leveraged by all courts for disaster recovery purposes.	

Is outcome a rule or forms change? Yes []

Assignment:

[] Projects Subcommittee

[] Rules Subcommittee

[] Joint Appellate Tech Subcommittee

[] This project would benefit from a **workstream** led by an Executive Sponsor

Identify staffing resources (i.e., council, court, committees, subject matter expertise, partners):

Priority

[]

P1. Must be done (e.g., legal mandate, JCTC/council directive, urgently needed to remedy a problem causing significant cost or inconvenience to courts or the public, other urgency).

P2. Should be done.

J. Remote Video Interpreting Pilot

Summary: Explore Opportunities to Expand Remote Video Interpreting

Project Origin: Carryover Annual Agenda 2014 #2; Tactical Plan

Alignment to Tactical Plan: Courthouse Video Connectivity: Project 2: Video Remote Interpreting, p.23

Expected Outcomes	Est. Complete
1. Implement remote video language interpreting in at least one foreign language, in at least two courts, by the beginning of 2015.	
2. Update the branch website with corresponding resources.	

Is outcome a rule or forms change? Yes []

Assignment:

- | | |
|--|--|
| [<input type="checkbox"/>] Projects Subcommittee | [<input type="checkbox"/>] This project would benefit from a workstream led by an Executive Sponsor |
| [<input type="checkbox"/>] Rules Subcommittee | |
| [<input type="checkbox"/>] Joint Appellate Tech Subcommittee | |

Identify staffing resources (i.e., council, court, committees, subject matter expertise, partners):

Develop a joint Task Force; Court Interpreters Advisory Panel and the Joint Working Group for California’s Language Access Plan; Court Operations Special Services Office and Court Interpreters Program; Policy Coordination and Liaison Committee (PCLC); Of

<p><u>Priority</u></p> <p>[<input type="checkbox"/>]</p>
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P1. Must be done (e.g., legal mandate, JCTC/council directive, urgently needed to remedy a problem causing significant cost or inconvenience to courts or the public, other urgency).

P2. Should be done.

K. Remote Video in Traffic

Summary: Expand Remote Video Traffic Program

Project Origin: Combination of Carryover Annual Agenda 2014 #13 (item 2); notice from Patrick O'Donnell (Legal Services) regarding the pilot program; and Tactical Plan

Alignment to Tactical Plan: Courthouse Video Connectivity: Project 1: Remote Video Hearings, p.22, 23

Expected Outcomes	Est. Complete
1. Review of the rule and consideration of whether the pilot should be extended or made permanent.	
2. Implement remote traffic appearances in at least two other jurisdictions by the end of 2014.	
3. Update the branch website with corresponding resources.	

Is outcome a rule or forms change? Yes []

Assignment:

- | | |
|--|--|
| [<input type="checkbox"/>] Projects Subcommittee | [<input type="checkbox"/>] This project would benefit from a workstream led by an Executive Sponsor |
| [<input type="checkbox"/>] Rules Subcommittee | |
| [<input type="checkbox"/>] Joint Appellate Tech Subcommittee | |

Identify staffing resources (i.e., council, court, committees, subject matter expertise, partners):

<p><u>Priority</u> [<input type="checkbox"/>]</p>	<p>P1. Must be done (e.g., legal mandate, JCTC/council directive, urgently needed to remedy a problem causing significant cost or inconvenience to courts or the public, other urgency). P2. Should be done.</p>
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L. Remote Video Technologies and Standards

Summary: Establish Model Technologies and Standards for Remote Video

Project Origin: Jake Chatters

Alignment to Tactical Plan: Courthouse Video Connectivity, p.22

Expected Outcomes	Est. Complete
1. Define standards to reduce contention when deploying video, instructions for litigants on required behavior when on video, jury advisements for when video is in use, and a defined list of stipulations (by case type) required for use of video.	
2. Provide example or model technology packages that courts could consider.	
3. Update the branch website with corresponding resources.	

Is outcome a rule or forms change? Yes []

Assignment:

- | | |
|--|--|
| [<input type="checkbox"/>] Projects Subcommittee | [<input type="checkbox"/>] This project would benefit from a workstream led by an Executive Sponsor |
| [<input type="checkbox"/>] Rules Subcommittee | |
| [<input type="checkbox"/>] Joint Appellate Tech Subcommittee | |

Identify staffing resources (i.e., council, court, committees, subject matter expertise, partners):

<p><u>Priority</u> [<input type="checkbox"/>]</p>	<p>P1. Must be done (e.g., legal mandate, JCTC/council directive, urgently needed to remedy a problem causing significant cost or inconvenience to courts or the public, other urgency). P2. Should be done.</p>
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M. Collaboration Meetings Server

Summary: Acquire and Implement WebEx Meetings Server

Project Origin: Brian Cotta

Alignment to Tactical Plan: Courthouse Video Connectivity, p.22; also may generally align with Technology Initiatives to Optimize Branch Resources and/or Infrastructure

Expected Outcomes	Est. Complete
1. Consider acquisition and purchase of Cisco WebEx Meetings Server for unlimited collaboration inside and outside of the branch, allowing onsite and offsite users to meet (audio/video/content sharing) using computer, devices, tablets, etc.	

Is outcome a rule or forms change? Yes []

Assignment:

[] Projects Subcommittee

[] Rules Subcommittee

[] Joint Appellate Tech Subcommittee

[] This project would benefit from a **workstream** led by an Executive Sponsor

Identify staffing resources (i.e., council, court, committees, subject matter expertise, partners):

Priority

[]

P1. Must be done (e.g., legal mandate, JCTC/council directive, urgently needed to remedy a problem causing significant cost or inconvenience to courts or the public, other urgency).

P2. Should be done.

N. E-Business Webinar Series

Summary: Evaluate and Continue Development of Webinar Series Promoting E-Business

Project Origin: Carryover Annual Agenda 2014 #5

Alignment to Tactical Plan: ??

Expected Outcomes	Est. Complete
1. Evaluate the effectiveness and use of the first webinar launched by the Outreach Subcommittee on Remote Video Technologies, implementing lessons learned. Report findings to the JCTC.	
2. Subject to JCTC approval, develop the strategy, model and contents for the second installment of an e-delivered (web-based) e-business webinar series on the topic of remote interpreting.	

Is outcome a rule or forms change? Yes []

Assignment:

[] Projects Subcommittee

[] Rules Subcommittee

[] Joint Appellate Tech Subcommittee

[] This project would benefit from a **workstream** led by an Executive Sponsor

Identify staffing resources (i.e., council, court, committees, subject matter expertise, partners):

Priority

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P1. Must be done (e.g., legal mandate, JCTC/council directive, urgently needed to remedy a problem causing significant cost or inconvenience to courts or the public, other urgency).

P2. Should be done.

O. Privacy Policy

Summary: Develop Branch & Model Court Privacy Policies on Electronic Court Records and Access

Project Origin: Carryover Annual Agenda 2014 #8; Code Civ. Proc., § 1010.6 (enacted in 1999) required the Judicial Council to adopt uniform rules on access to public records; subsequently the rules have been amended in response to changes in the law and technology, reque

Alignment to Tactical Plan: Technology Initiatives to Promote Rule and Legislative Changes, p.49

Expected Outcomes	Est. Complete
1. Develop a comprehensive statewide privacy policy addressing electronic access to court records and data to align with both state and federal requirements.	
2. Develop a model (local) court privacy policy, outlining the key contents and provisions to address within a local court's specific policy.	

Is outcome a rule or forms change? Yes []

Assignment:

- [] Projects Subcommittee
 - [] Rules Subcommittee
 - [] Joint Appellate Tech Subcommittee
- [] This project would benefit from a **workstream** led by an Executive Sponsor

Identify staffing resources (i.e., council, court, committees, subject matter expertise, partners):

In cooperation with CEAC, Criminal Law Advisory Committee, Department of Justice, JC IT and Legal Services

<p>Priority</p> <p>[<input type="checkbox"/>]</p>
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P1. Must be done (e.g., legal mandate, JCTC/council directive, urgently needed to remedy a problem causing significant cost or inconvenience to courts or the public, other urgency).

P2. Should be done.

P. E-Signatures

Summary: Develop Standards for Electronic Signatures

Project Origin: Carryover Annual Agenda 2014 #10

Alignment to Tactical Plan: Technology Initiatives to Promote Rule and Legislative Changes, p.49; **3rd bullet**

Expected Outcomes	Est. Complete
1. Develop procedures and standards for use of electronic and digital signatures for court documents, as specified in Government Code section 68150(g), for inclusion in the Court Records Manual.	
2. Recommend rule proposal incorporating standards into Rules of Court, as appropriate.	

Is outcome a rule or forms change? Yes []

Assignment:

[] Projects Subcommittee

[] Rules Subcommittee

[] Joint Appellate Tech Subcommittee

[] This project would benefit from a **workstream** led by an Executive Sponsor

Identify staffing resources (i.e., council, court, committees, subject matter expertise, partners):

CEAC, IT and Legal Services

Priority

[]

P1. Must be done (e.g., legal mandate, JCTC/council directive, urgently needed to remedy a problem causing significant cost or inconvenience to courts or the public, other urgency).

P2. Should be done.

Q. Electronic Recording

Summary: Survey and Report State of Electronic Recording in the Courts

Project Origin: Carryover Annual Agenda 2014 #11

Alignment to Tactical Plan: ??

Expected Outcomes	Est. Complete
1. Survey current usage of electronic recording in the courts, i.e., define and evaluate areas where recordings are being used, problems with existing practice, and technology available for improved usage.	
NOTE: This study evaluates current use and technology and does not propose expansion of usage.	
2. Present summarized findings to the JCTC.	

Is outcome a rule or forms change? Yes []

Assignment:

[] Projects Subcommittee

[] Rules Subcommittee

[] Joint Appellate Tech Subcommittee

[] This project would benefit from a **workstream** led by an Executive Sponsor

Identify staffing resources (i.e., council, court, committees, subject matter expertise, partners):

Survey via the Court Executives Advisory Committee (CEAC), the Trial Court Presiding Judges Advisory Committee (TCPJAC), and court Chief Information Officers (CIOs)

Priority

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P1. Must be done (e.g., legal mandate, JCTC/council directive, urgently needed to remedy a problem causing significant cost or inconvenience to courts or the public, other urgency).

P2. Should be done.

R. Trial Courts: Modernize Rules

Summary: Modernize Trial Court Rules to Support E-Business

Project Origin: Carryover Annual Agenda 2014 #9.

Alignment to Tactical Plan: Technology Initiatives to Promote Rule and Legislative Changes, p.49

Expected Outcomes	Est. Complete
1. In collaboration with other advisory committees, identify and develop priorities for potential rule and statutory modifications so that the rules and statutes will be consistent with modern business practices.	
2. Review rules and statutes in a systematic manner and develop recommendations for comprehensive changes. The review and recommendations may be made in phases: (1) initial phase, (2) second phase, (3) final phase.	
3. Consider including as part of the anticipated E-Filing Summit.	

Is outcome a rule or forms change? Yes []

Assignment:

- | | |
|--|--|
| [<input type="checkbox"/>] Projects Subcommittee | [<input type="checkbox"/>] This project would benefit from a workstream led by an Executive Sponsor |
| [<input type="checkbox"/>] Rules Subcommittee | |
| [<input type="checkbox"/>] Joint Appellate Tech Subcommittee | |

Identify staffing resources (i.e., council, court, committees, subject matter expertise, partners):

Civil and Small Claims Advisory Committee, Criminal Law Advisory Committee, Traffic Advisory Committee, Family and Juvenile Law Advisory Committee, Probate and Mental Health Advisory Committee, IT and Legal Services

<p><u>Priority</u></p> <p>[<input type="checkbox"/>]</p>	<p>P1. Must be done (e.g., legal mandate, JCTC/council directive, urgently needed to remedy a problem causing significant cost or inconvenience to courts or the public, other urgency).</p> <p>P2. Should be done.</p>
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S. Appellate Courts: Modernize Rules

Summary: Modernize Appellate Court Rule for E-Filing and E-Business

Project Origin: Carryover Annual Agenda 2014 #12

Alignment to Tactical Plan: Technology Initiatives to Promote Rule and Legislative Changes, p.49

Expected Outcomes	Est. Complete
1. Review rules and statutes in a systematic manner to develop recommendations for comprehensive changes so that the rules and statutes will be consistent with modern business practices (e.g., consider rule modifications to eliminate paper dependencies).	

Is outcome a rule or forms change? Yes []

Assignment:

- [] Projects Subcommittee
 - [] Rules Subcommittee
 - [] Joint Appellate Tech Subcommittee
- [] This project would benefit from a **workstream** led by an Executive Sponsor

Identify staffing resources (i.e., council, court, committees, subject matter expertise, partners):

Appellate Advisory Committee, Legal Services

<p><u>Priority</u></p> <p>[<input type="checkbox"/>]</p>
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- P1. Must be done** (e.g., legal mandate, JCTC/council directive, urgently needed to remedy a problem causing significant cost or inconvenience to courts or the public, other urgency).
- P2. Should be done.**

T. Appellate Courts: Collaborate on Rules

Summary: Coordinate with subcommittees on Rules and Policy Matters Concerning the Appellate Courts

Project Origin: Annual Agenda 2014 #15

Alignment to Tactical Plan: Technology Initiatives to Promote Rule and Legislative Changes, p.49

Expected Outcomes	Est. Complete
1. Consult, upon request from CTAC and AAC, on matters of concern to the appellate courts including the certification of electronic records, developing standards for e-signatures on filed documents, and retention of paper original for e-filed documents.	

Is outcome a rule or forms change? Yes []

Assignment:

- [] Projects Subcommittee
- [] Rules Subcommittee
- [] Joint Appellate Tech Subcommittee

[] This project would benefit from a **workstream** led by an Executive Sponsor

Identify staffing resources (i.e., council, court, committees, subject matter expertise, partners):

IT and Legal Services

<p><u>Priority</u> []</p>

P1. Must be done (e.g., legal mandate, JCTC/council directive, urgently needed to remedy a problem causing significant cost or inconvenience to courts or the public, other urgency).

P2. Should be done.

U. Appellate Courts: Electronic Service

Summary: Appellate Courts: Electronic Service

Project Origin: Justice Mauro, Heather Anderson; Suggestion received from trial court executive officer

Alignment to Tactical Plan: Technology Initiatives to Promote Rule and Legislative Changes, p.49

Expected Outcomes	Est. Complete
1. Consider whether to recommend rule amendments to clarify that a court may be served electronically if the court consents to receive this form of service.	

Is outcome a rule or forms change? Yes []

Assignment:

- [] Projects Subcommittee
- [] Rules Subcommittee
- [] Joint Appellate Tech Subcommittee
- [] This project would benefit from a **workstream** led by an Executive Sponsor

Identify staffing resources (i.e., council, court, committees, subject matter expertise, partners):

<p><u>Priority</u></p> <p>[<input type="checkbox"/>]</p>	<p>P1. Must be done (e.g., legal mandate, JCTC/council directive, urgently needed to remedy a problem causing significant cost or inconvenience to courts or the public, other urgency).</p> <p>P2. Should be done.</p>
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V. Appellate Courts: Collaborate on Technology Implementations

Summary: Collaborate on Statewide Appellate Court Technology Implementations

Project Origin: Annual Agenda 2014 #13

Alignment to Tactical Plan: ??

Expected Outcomes	Est. Complete
1. Consult, as requested, on evaluation of the First Appellate District’s e-filing project and to support a statewide appellate e-filing implementation.	
2. Consult, as requested, on the branch project to select and integrate an appellate document management system (DMS) with court e-filing and the Appellate Court Case Management System (ACCMS).	

Is outcome a rule or forms change? Yes []

Assignment:

[] Projects Subcommittee

[] Rules Subcommittee

[] Joint Appellate Tech Subcommittee

[] This project would benefit from a **workstream** led by an Executive Sponsor

Identify staffing resources (i.e., council, court, committees, subject matter expertise, partners):

IT and Legal Services

Priority

[]

P1. Must be done (e.g., legal mandate, JCTC/council directive, urgently needed to remedy a problem causing significant cost or inconvenience to courts or the public, other urgency).

P2. Should be done.

W. Appellate Courts: Public access to appellate records

Summary: Develop Branch Policy on Public Access to Electronic Appellate Court Records

Project Origin: Annual Agenda 2014 #14; also, see rule 2.500 (“The [trial court] rules... are intended to provide the public with reasonable access to trial court records that are in electronic form, while protecting privacy interests.”)

Alignment to Tactical Plan: ??

Expected Outcomes	Est. Complete
1. Develop a comprehensive statewide policy addressing reasonable public access to electronic appellate court records to align with access rules for the trial courts.	
2. Draft rule proposal to incorporate standards into Rules of Court, as appropriate.	

Is outcome a rule or forms change? Yes []

Assignment:

[] Projects Subcommittee

[] Rules Subcommittee

[] Joint Appellate Tech Subcommittee

[] This project would benefit from a **workstream** led by an Executive Sponsor

Identify staffing resources (i.e., council, court, committees, subject matter expertise, partners):

IT and Legal Services

Priority

[]

P1. Must be done (e.g., legal mandate, JCTC/council directive, urgently needed to remedy a problem causing significant cost or inconvenience to courts or the public, other urgency).

P2. Should be done.

X. Liaison Information Exchange

Summary: Liaise with JC Advisory Bodies and the Branch

Project Origin: Annual Agenda 2014 #16; slightly edited for clarification

Alignment to Tactical Plan: ??

Expected Outcomes	Est. Complete
1. Share the Judicial Branch Technology Report with advisory bodies and attend liaison committee meetings.	
2. Report liaison feedback to the JCTC, the Judicial Council, and the branch, as appropriate.	

Is outcome a rule or forms change? Yes []

Assignment:

[] Projects Subcommittee

[] Rules Subcommittee

[] Joint Appellate Tech Subcommittee

[] This project would benefit from a **workstream** led by an Executive Sponsor

Identify staffing resources (i.e., council, court, committees, subject matter expertise, partners):

Priority

[]

P1. Must be done (e.g., legal mandate, JCTC/council directive, urgently needed to remedy a problem causing significant cost or inconvenience to courts or the public, other urgency).

P2. Should be done.

Y. Tactical Plan for Technology

Summary: Update Tactical Plan for Technology for Effective Date 2016-2018

Project Origin: Justice Bruiniers

Alignment to Tactical Plan: N/A

Expected Outcomes	Est. Complete
1. Review and update the Tactical Plan for Technology.	
2. Circulate for branch and public comment.	
3. Finalize and submit for approval.	

Is outcome a rule or forms change? Yes []

Assignment:

[] Projects Subcommittee

[] Rules Subcommittee

[] Joint Appellate Tech Subcommittee

[] This project would benefit from a **workstream** led by an Executive Sponsor

Identify staffing resources (i.e., council, court, committees, subject matter expertise, partners):

Priority

[]

P1. Must be done (e.g., legal mandate, JCTC/council directive, urgently needed to remedy a problem causing significant cost or inconvenience to courts or the public, other urgency).

P2. Should be done.

DRAFT