



JUDICIAL COUNCIL
OF CALIFORNIA

TECHNOLOGY COMMITTEE

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jctc@jud.ca.gov

JUDICIAL COUNCIL TECHNOLOGY COMMITTEE

Open to the Public (Cal. Rules of Court, rule 10.75(c)(1))
THIS MEETING WILL BE CONDUCTED BY TELECONFERENCE
THIS MEETING WILL BE RECORDED

Date: January 11, 2021
Time: 12:00 noon - 1:00 p.m.
Connection: <https://jcc.granicus.com/player/event/1132?&redirect=true>

Meeting materials will be posted on the advisory body web page on the California Courts website at least three business days before the meeting.

Agenda items are numbered for identification purposes only and will not necessarily be considered in the indicated order.

I. OPEN MEETING (CAL. RULES OF COURT, RULE 10.75(C)(1))

Call to Order and Roll Call

Approval of Minutes

Approve minutes of the December 14, 2020 meeting.

II. PUBLIC COMMENT (CAL. RULES OF COURT, RULE 10.75(K)(2))

Written Comment

In accordance with California Rules of Court, rule 10.75(k)(1), public comments about any agenda item must be submitted by January 8, 2021, 12:00 noon. Written comments should be e-mailed to jctc@jud.ca.gov. Only comments received by January 8, 2021, 12:00 noon will be provided to advisory body members prior to the start of the meeting.

III. DISCUSSION AND POSSIBLE ACTION ITEMS (ITEMS 1- 4)

Item 1

Chair Report

Provide an update on activities of or news from the Judicial Council, advisory bodies, courts, and/or other justice partners.

Presenter: Hon. Kyle S. Brodie, Chair, Judicial Council Technology Committee

Item 2

Review of Information Technology Advisory Committee's (ITAC) 2021 Annual Agenda (Action Requested)

Review of the annual agenda for ITAC. The committee will then be asked to provide feedback and consider approval of the annual agenda.

Presenter: Hon. Sheila F. Hanson, Chair, Information Technology Advisory Committee

Item 3

Court Technology Modernization Funding: Update and Report

Provide a status update on activities related to the direct allocations to the trial courts approved by the committee, as well as the branchwide initiatives.

Presenter: Ms. Heather L. Pettit, Chief Information Officer / Director, Information Technology

Item 4

Court Technology Modernization Funding – Reserve Funding: Proposed Recommendations (Action Requested)

Previously, the committee approved reserving \$2.5 million of the court modernization funding for contingencies and related needs in executing the FY20/21 modernization efforts. The committee will consider approval of a recommended use of reserve funds to support immediate needs.

Presenter: Ms. Heather L. Pettit, Chief Information Officer / Director, Information Technology

A D J O U R N M E N T

Adjourn



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JUDICIAL COUNCIL TECHNOLOGY COMMITTEE

MINUTES OF OPEN MEETING

December 14, 2020
12:00 noon – 1:00 p.m.
videoconference

Advisory Body Members Present: Hon. Kyle S. Brodie, Chair; Hon. Todd C. Bottke, Vice-Chair; Hon. Kevin C. Brazile; Hon. Carol Corrigan; Hon. Jonathan B. Conklin; Hon. Glenn Mondo; Ms. Rachel W. Hill; and Mr. Shawn Landry

Liaison Members Present: Hon. Sheila F. Hanson

Others Present: Ms. Heather L. Pettit; Ms. Jamel Jones; Ms. Jessica Craven; Ms. Deborah Silcox; Mr. John Yee; Mr. Mark Dusman; Mr. Andrae Randolph; Ms. Camilla Kieliger; and Ms. Fran Mueller

OPEN MEETING

Call to Order and Roll Call

The chair called the meeting to order, took roll call, and advised that no public comments were received.

Approval of Minutes

The committee reviewed and approved the minutes of the October 9, 2020 open meeting and October 20, 2020 action by email.

DISCUSSION AND ACTION ITEMS (ITEMS 1-5)

Item 1

Chair Report

Update: Hon. Kyle S. Brodie, Chair, welcomed and thanked everyone for attending. Judge Brodie discussed activities since the last meeting. Judge Brodie also reviewed the agenda topics for the meeting.

Item 2

Update/Report on Information Technology Advisory Committee (ITAC)

Update: Hon. Sheila F. Hanson, Chair of ITAC, provided an update and report on the activities of the advisory committee, its subcommittees, and its workstreams.

Action: The committee received the report.

Item 3

Court Technology Modernization Funding – Direct Allocations to Trial Courts:

Update and Proposed Recommendations (Action Requested)

Update: Ms. Heather L. Pettit, Chief Information Officer / Director of Judicial Council Information Technology provided an update and report on the direct allocations to the trial courts. Previously, the committee approved \$12.5 million of the court modernization funding to be distributed across the Superior Courts of California (i.e., trial courts) in FY20/21.

Action: The committee received the report, asked questions, discussed the proposed awards, and voted unanimously to approve.

Item 4

Court Technology Modernization Funding – Branchwide Initiatives: Update and Report

Update: Ms. Heather L. Pettit provided a status update on the activities related to the branchwide initiatives. Previously, the committee approved \$10 million of the court modernization funding for use toward branchwide initiatives across 13 program categories.

Action: The committee received the report and asked questions.

Item 5

Court Technology Modernization Funding – Reserve Funding: Proposed Recommendations (Action Requested)

Update: This item was deferred to a future meeting.

Action: This item was deferred to a future meeting.

A D J O U R N M E N T

There being no further business, the meeting was adjourned.

Information Technology Advisory Committee (ITAC)

Annual Agenda¹—2021

Approved by Judicial Council Technology Committee:

I. COMMITTEE INFORMATION

Chair:	Hon. Sheila F. Hanson, Superior Court of California, County of Orange
Lead Staff:	Camilla Kieliger, Sr. Business Systems Analyst, Judicial Council Information Technology
Committee's Charge/Membership: <u>Rule 10.53. Information Technology Advisory Committee</u> of the California Rules of Court states the charge of the Information Technology Advisory Committee. The committee makes recommendations to the council for improving the administration of justice through the use of technology and for fostering cooperative endeavors to resolve common technological issues with other stakeholders in the justice system. The committee promotes, coordinates, and acts as executive sponsor for projects and initiatives that apply technology to the work of the courts. <u>Rule 10.53. Information Technology Advisory Committee</u> sets forth additional duties of the committee. ITAC currently has 24 members. The <u>ITAC website</u> provides the composition of the committee. Subcommittees²: <ul style="list-style-type: none">• Rules & Policy Subcommittee<ul style="list-style-type: none">○ Trial court rules and statutes revisions• Joint Appellate Technology Subcommittee (JATS) [suspended status for 2021]• Joint Ad Hoc Subcommittee on Remote Video Appearances	

¹ The annual agenda outlines the work a committee will focus on in the coming year and identifies areas of collaboration with other advisory bodies and the Judicial Council staff resources

² California Rules of Court, rule 10.30 (c) allows an advisory body to form subgroups, composed entirely of current members of the advisory body, to carry out the body's duties, subject to available resources, with the approval of its oversight committee

All proposed projects for the year are included on the Annual Agenda, as follows:

Futures Commission Directives:

One directive is only awaiting review and approval by the Judicial Council:

- **Voice-to-Text Language Services Outside the Courtroom (continued):** Explore available technologies and make recommendations to the Judicial Council on the potential for a pilot project using voice-to-text language interpretation at service counters and in self-help centers.

Workstreams

- **Tactical Plan for Technology Update (continued):** Update the *Tactical Plan for Technology* for effective date 2021-2022.
- **Identity and Access Management Strategy (continued):** Develop a branch identity management strategy.
- **Digital Evidence: Rules, Technology and Pilot Evaluation (continued):** Investigate and draft technology best practices, standards, and policies, and propose changes to evidence-based rules and statutes.
- **Data Analytics: Assessment and Report (continued):** Scope and recommend a data analytics strategy for the branch.
- **Disaster Recovery Initial Pilot and Knowledge Sharing (continued):** Implement branch disaster recovery pilot program, master agreement, knowledge-sharing; evaluate need for BCP.
- **Online Dispute Resolution (ODR): Research (continued):** Identify and evaluate available ODR technologies and potential scenarios in which ODR might benefit the judicial branch and its court users.
- **Branchwide Information Security Roadmap (continued):** Develop a defined structure of activities that will collectively enhance the judicial branch information security posture.

III. COMMITTEE PROJECTS

Existing Project (Ending 2021)	
1. Futures Commission Directive: Voice-to-Text Language Services Outside the Courtroom	<i>Priority 1</i> ³
Workstream membership approved October 15, 2018	Scope category(ies): Possibilities, Pilot
<p>Project Summary: The committee was directed by the Chief Justice to explore available technologies and make recommendations to the Judicial Council on the potential for a pilot project using voice-to-text language services at court filing and service counters and in self-help centers. To leverage current BCP funding, a pilot program will be implemented as a part of this workstream.</p> <p>Key Objectives:</p> <p>(a) At the completion of these directives, present findings and recommendations to, and seek approval from, ITAC, the Technology Committee and, if appropriate, the Judicial Council. Formally sunset the workstream. [Scheduled for January 22, 2021]</p> <p>Objectives met or resolved:</p> <ul style="list-style-type: none"> • <i>Define the standard of success and how to measure it as well as define the difference between translation and interpretation.</i> • <i>Determine how, or if, the work for this initiative aligns with existing work of the Language Access Plan Implementation Task Force (LAPITF) and the work of The Legal Design Lab at the Stanford University Law School.</i> • <i>Set up a technical lab environment at the Judicial Council or a local court to test the technical recommendations of the Futures Commission for this initiative.</i> • <i>Test various voice-to-text language services in a lab environment, which will allow for exposure to more technologies and shorter learning cycles than if a specific technology is deployed at a court for piloting.</i> • <i>Identify and pursue any possible pilot collaborations with the Legal Design Lab at the Stanford University Law School.</i> • <i>Support implementation of a voice-to-text pilot program (including kickoff, court preparations, site visits, and deployment).</i> • <i>Capture learnings and draft a white paper report on the lessons learned, findings, use cases, usage guidelines, and recommendations for next steps.</i> <p>Origin of Project: Chief Justice directive from the Futures Commission recommendations report; assigned to ITAC in May 2017.</p> <p>Status/Timeline: January 2021</p> <p>Resources:</p> <ul style="list-style-type: none"> • <i>ITAC: Workstream, Sponsor: Hon. James Mize</i> • <i>Judicial Council Staffing: Information Technology</i> • <i>Collaborations: Court CIOs, pilot courts, Court Innovation Grant awardees</i> 	

³ For non-rules and forms projects, select priority level 1 (must be done) or 2 (should be done).

Existing Workstream (Ending 2021)	
2. Tactical Plan for Technology Update	<i>Priority 1</i>
Workstream membership approved August 13, 2020	<i>Scope category(ies): Policy</i>
<p>Project Summary: Update <i>Tactical Plan for Technology</i> for effective date 2021-2022.</p> <p>Key Objectives:</p> <ul style="list-style-type: none"> (b) Circulate the draft plan for branch and public comment; revise as needed. (c) Finalize, and seek approval from ITAC, the Technology Committee, and the Judicial Council. Formally sunset the workstream. <p>Objectives met or resolved:</p> <ul style="list-style-type: none"> • <i>Initiate workstream, including formation of membership and conduct orientation/kickoff meeting.</i> • <i>Review, gather input, and prepare an update of the Tactical Plan for Technology.</i> <p>Origin of Project: Specific charge of ITAC per Rule 10.53 (b)(8).</p> <p>Status/Timeline: March 2021</p> <p>Fiscal Impact:</p> <p><input type="checkbox"/> This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.</p> <p>Resources:</p> <ul style="list-style-type: none"> • <i>ITAC: Workstream, Sponsor: Hon. Sheila Hanson</i> • <i>Judicial Council Staffing: Information Technology</i> • <i>Collaborations: Broad input from the branch and the public</i> 	

Existing Workstream (Ending 2021)	
3. Identity and Access Management Strategy	Priority 1
Workstream membership approved September 25, 2018	Scope category(ies): Possibilities, Prototypes, Pilot, Policy/Procurement
<p>Project Summary: Develop a branch identity management strategy.</p> <p>Key Objectives:</p> <ul style="list-style-type: none"> (a) Develop the roadmap for a branch identity management strategy and approach. (b) Determine policies and processes for identity management (including proofing and access management). (c) Ensure linkage and alignment with other branchwide initiatives such as E-Filing, SRL Portal, Next Generation Hosting, CMS Migration and Deployment. (d) Coordinate and plan with JCIT regarding operational support. (e) At the completion of these objectives, present findings and recommendations to, and seek approval from ITAC, the Technology Committee and, if appropriate, the Judicial Council. Formally sunset the workstream. <p>Objectives met or resolved:</p> <ul style="list-style-type: none"> • <i>Phase 1: Develop and issue an RFP for a statewide identity management service/provider; identify and select (completed 2018).</i> • <i>Recommend changes to Rules of Court as needed and work with the Rules & Policy Subcommittee to draft them.</i> <p>Origin of Project: Previously, this was a sub-task of the e-filing initiative. The item was promoted to its own annual agenda initiative given its many touchpoints with other workstreams (including Self-Represented Litigants E-Services, Next-Generation Hosting, E-filing Strategy, etc.). <i>Tactical Plan for Technology 2017-18, 2019-20, and 2021-22 (pending).</i></p> <p>Status/Timeline: March 2021</p> <p>Fiscal Impact:</p> <p><input type="checkbox"/> This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.</p> <p>Resources:</p> <ul style="list-style-type: none"> • <i>ITAC:</i> Workstream, Sponsor: Mr. Snorri Ogata • <i>Judicial Council Staffing:</i> Information Technology, Legal Services, Branch Accounting and Procurement • <i>Collaborations:</i> CEAC, TCPJAC, and their Joint Technology Subcommittee 	

Existing Workstream (Ending 2021)	
4. Digital Evidence: Rules, Technology and Pilot Evaluation	<i>Priority 1</i>
Workstream membership approved September 25, 2019	<i>Scope category(ies): Policy; Pilot</i>
<p><i>Project Summary:</i> Consider existing pilots and court practices along with available technology pertaining to the use of digital evidence; propose changes to rules and statutes related to digital evidence; develop a framework for successful possible future pilots.</p> <p><i>Key Objectives:</i></p> <p>Based on findings from Phase 1 and evaluation of existing local pilots and other court practices:</p> <ul style="list-style-type: none"> (a) Investigate and report on existing local pilots and court practices, including policies and standards, for transmitting, accepting, storing, and protecting digital evidence. (b) Research and recommend available technology and services that would support transmission, acceptance, storage, and protection of digital evidence. (c) Develop a framework for successful possible future pilots, including use case scenarios, costs and benefits, and success criteria (d) At the completion of these objectives, present findings and recommendations to, and seek approval from, ITAC, the Technology Committee and, if appropriate, the Judicial Council. Formally sunset the workstream. <p><i>Objectives met or resolved:</i></p> <ul style="list-style-type: none"> • <i>Develop and propose changes to Rules of Court and statutes related to digital evidence in collaboration with the Rules and Policy Subcommittee.</i> <p><i>Origin of Project:</i> Tactical Plan for Technology 2017-18, 2019-20, and 2021-22 (pending).</p> <p><i>Status/Timeline:</i> December 2021</p> <p><i>Fiscal Impact:</i></p> <p><input type="checkbox"/> This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.</p> <p><i>Resources:</i></p> <ul style="list-style-type: none"> • <i>ITAC:</i> Workstream, Sponsor: Hon. Kimberly Menninger • <i>Judicial Council Staffing:</i> Information Technology, Legal Services • <i>Collaborations:</i> CEAC, TCPJAC, ITAC Rules and Policy Subcommittee, and other advisory bodies as needed 	

Existing Workstream (Ending 2021)	
5. Data Analytics: Assessment and Report	<i>Priority 1</i>
Workstream membership approved July 23, 2018	<i>Scope category(ies): Possibilities; Policy</i>
<p><i>Project Summary:</i> Scope and recommend a data analytics strategy for the branch.</p> <p><i>Key Objectives:</i></p> <ul style="list-style-type: none"> (a) Identify, evaluate and prioritize possible policies, processes, and technologies to help the branch utilize data analytics to improve business effectiveness. (b) Develop appropriate governance recommendations at the local court and branch level. (c) Assess and report priorities for data collection. (d) Identify and evaluate possible data analytical tools and templates. (e) Identify whether new or amended Rules of Court and/or statutes are needed and advise the Rules & Policy Subcommittee for follow up. (f) At the completion of these objectives, present findings and recommendations to, and seek approval from, ITAC, the Technology Committee and, if appropriate, the Judicial Council. Formally sunset the workstream. <p><i>Origin of Project:</i> Topic resulted from a brainstorm of ideas conducted with ITAC and the court CIOs in late 2017; <i>Tactical Plan for Technology</i> 2019-20 and 2021-22 (pending).</p> <p><i>Status/Timeline:</i> May 2021</p> <p><i>Fiscal Impact:</i></p> <p><input type="checkbox"/> This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.</p> <p><i>Resources:</i></p> <ul style="list-style-type: none"> • <i>ITAC:</i> Workstream, Sponsors: Hon. Tara Desautels, Mr. David Yamasaki • <i>Judicial Council Staffing:</i> Information Technology, Budget Services, Criminal Justice Services, Judicial Branch Statistical Information System (JBSIS) Program, Center for Families, Children, and the Courts, Legal Services • <i>Collaborations:</i> CIOs, CEAC, TCPJAC, appellate group representation 	

Existing Workstream (Ending 2021)	
6. Disaster Recovery (DR) Initial Pilot and Knowledge Sharing	<i>Priority 1</i>
Workstream membership approved February 28, 2019	<i>Scope category(ies): Pilot</i>
<p>Project Summary: Implement branch disaster recovery (DR) pilot program, master agreement, knowledge-sharing; evaluate need for BCP.</p> <p>Key Objectives:</p> <p>Leveraging court experiences and pilots, the workstream will:</p> <ol style="list-style-type: none"> Publish disaster recovery to cloud (DR2C) roadmap for judicial branch entities (JBEs) that includes design solution templates from Monterey and other participant courts. Host knowledge-sharing sessions for interested JBEs (including tools to estimate cost for deploying recovery solution using a particular cloud service provider; and Monterey solution case study). Evaluate the need for a BCP to fund a pilot group of courts interested in implementing cloud-based DR for critical technology services (see (a)). Coordinate and plan with JCIT regarding operational support, if appropriate. At the completion of these objectives, present findings and recommendations to, and seek approval from, ITAC, the Technology Committee and, if appropriate, the Judicial Council and formally sunset the workstream. <p>Objectives met or resolved:</p> <ul style="list-style-type: none"> <i>Identify core team (sponsor and leads); form group membership; hold kickoff meeting(s).</i> <i>Establish a cloud DR master agreement with a short list of cloud service providers for judicial branch entities/courts to leverage</i> <i>Recommend a list of critical technology services that make business sense for cloud-based recovery adoption.</i> <p>Origin of Project: Tactical Plan for Technology 2017-18, 2019-20 and 2021-22 (pending); any next phase following framework adoption.</p> <p>Status/Timeline: June 2021</p> <p>Fiscal Impact:</p> <p><input type="checkbox"/> This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.</p> <p>Resources:</p> <ul style="list-style-type: none"> <i>ITAC:</i> Workstream, Sponsor: Mr. Paras Gupta <i>Judicial Council Staffing:</i> Information Technology <i>Collaborations:</i> Pilot courts; CEAC, CITMF 	

Existing Workstream (Ending 2021)	
7. Online Dispute Resolution (ODR): Research	Priority 2
Workstream membership approved July 10, 2020	Scope category(ies): Possibilities
<p>Project Summary: Identify and evaluate available ODR technologies and potential scenarios in which ODR might benefit the judicial branch and its court users.</p> <p>Key Objectives:</p> <ul style="list-style-type: none"> (a) Identify and evaluate available ODR technologies. (b) Evaluate and describe use case scenarios where ODR might be beneficially deployed in the judicial branch. (c) Survey and document best practices in evaluating feasibility and program design to maximize access to justice. (d) Review rules and statutes to identify areas where possible amendments will be needed. (e) At the completion of these objectives, present findings and recommendations to, and seek approval from, ITAC, the Technology Committee and, if appropriate, the Judicial Council. Formally sunset the workstream. <p>Objectives met or resolved:</p> <ul style="list-style-type: none"> • <i>Identify core team (sponsor and leads); form group membership; hold kickoff meeting(s).</i> • <i>Review findings from existing court-offered ODR programs.</i> <p>Origin of Project: <i>Tactical Plan for Technology 2019-20 and 2021-22 (pending)</i></p> <p>Status/Timeline: May 2021</p> <p>Fiscal Impact:</p> <p><input type="checkbox"/> This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.</p> <p>Resources:</p> <ul style="list-style-type: none"> • <i>ITAC: Workstream: Sponsor: Hon. Julie Culver</i> • <i>Judicial Council Staffing: Information Technology, Legal Services</i> • <i>Collaborations: CEAC; TCPJAC; Civil and Small Claims Advisory Committee</i> 	

Existing Workstream (Ending 2021)	
8. Branchwide Information Security Roadmap	<i>Priority 1</i>
Workstream membership approved September 6, 2019	<i>Scope category(ies): Possibilities, Policy</i>
<p><i>Project Summary:</i> Develop a defined structure of activities and recommendations that will collectively enhance the judicial branch information security posture.</p> <p><i>Key Objectives:</i></p> <ul style="list-style-type: none"> (a) Define methods, activities and/or initiatives for expanding and strengthening branch information security capabilities. (b) Create an overarching strategy for educating courts on information security end user education, risk management, and incident response. (c) Identify resources to assist the courts in developing policies and procedures based on the Judicial Branch Information Systems Controls Framework. (d) Consult with other workstreams on individual security recommendations and ensure alignment with ongoing development of Judicial Branch security standards. (e) At the completion of these objectives, present findings and recommendations to, and seek approval from, ITAC, the Technology Committee and, if appropriate, the Judicial Council. Formally sunset the workstream. <p><i>Objectives met or resolved:</i></p> <ul style="list-style-type: none"> • <i>Identify core team (sponsor and leads); form group membership; hold kickoff meeting(s).</i> <p><i>Origin of Project:</i> <i>Tactical Plan for Technology 2019-20 and 2021-22 (pending)</i></p> <p><i>Status/Timeline:</i> March 2021</p> <p><i>Fiscal Impact:</i></p> <p><input type="checkbox"/> This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.</p> <p><i>Resources:</i></p> <ul style="list-style-type: none"> • <i>ITAC: Workstream, Sponsors: Hon. Donald I. Segerstrom, Jr, Mr. Brian Cotta</i> • <i>Judicial Council Staffing: Information Technology</i> • <i>Collaborations: CITMF</i> 	

Ongoing Project	
9.1 Trial Court Rules and Statutes Revisions	<i>Priority 1⁴</i>
	<i>Scope category(ies): Policy</i>
<p>Project Summary: Revise statutes and the California Rules of Court for the trial courts to support e-business. In collaboration with other advisory committees, as needed, review rules and statutes and develop recommendations for amendments to align with modern business practices.</p> <p>Proposals within the scope of this item include:</p> <ul style="list-style-type: none"> (a) Develop legislative and rule proposals for electronic exhibits and evidence based on the needs identified by the Digital Evidence Workstream including defining "lodged electronic exhibits," permitting courts to use vendors for storage of electronic exhibits and evidence; and removing requirements that clerks return exhibits if they are in electronic format. (b) Assist the Criminal Law Advisory Committee (CLAC) with the development of legislative and rule proposals for remote video proceedings in criminal matters including having a Rules and Policy Subcommittee member serve on the CLAC working group. (c) Develop a proposal to amend permissive electronic filing and electronic service rules to reference Penal Code section 690.5. <p>Origin of Project: <i>Tactical Plan for Technology 2019-20 and 2021-22</i> (pending). Public comments. Standing item on the agenda.</p> <p>Status/Timeline: Ongoing.</p> <p>Fiscal Impact:</p> <p><input type="checkbox"/> This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials.</p> <p>Resources:</p> <ul style="list-style-type: none"> • <i>ITAC:</i> Rules & Policy Subcommittee, Chair: Hon. Peter Siggins • <i>Judicial Council Staffing:</i> Legal Services, Information Technology, Governmental Affairs • <i>Collaborations:</i> Appellate, Civil & Small Claims, Criminal Law, Traffic, Family and Juvenile Law, and Probate and Mental Health advisory committees; TCPJAC, CEAC and their Joint Technology, Rules, and Legislative Subcommittees 	

⁴ For rules and forms proposals, the following priority levels apply: 1(a) Urgently needed to conform to the law; 1(b) Urgently needed to respond to a recent change in the law; 1(c) Adoption or amendment of rules or forms by a specified date required by statute or council decision; 1(d) Provides significant cost savings and efficiencies, generates significant revenue, or avoids a significant loss of revenue; 1(e) Urgently needed to remedy a problem that is causing significant cost or inconvenience to the courts or the public; 1(f) Otherwise urgent and necessary, such as a proposal that would mitigate exposure to immediate or severe financial or legal risk; 2(a) Useful, but not necessary, to implement statutory changes; 2(b) Helpful in otherwise advancing Judicial Council goals and objectives.

Existing One-Time Project (Ending 2021)	
9.2 Remote Video Appearances in Civil Proceedings	<i>Priority 1</i>
	<i>Scope category(ies):</i> Policy
<p>Project Summary: Develop legislative and rule proposals to further the recommendations of the Commission on the Future of California’s Court System (Futures Commission) relating to video remote appearances by parties, counsel, and witnesses for most noncriminal court proceedings (pursuant to directive to ITAC from the Chief Justice).</p> <p>Key Objectives:</p> <ul style="list-style-type: none"> (a) Continue participating in a joint ad hoc subcommittee with Civil and Small Claims, Family and Juvenile Law, and Probate and Mental Health Advisory Committees to develop legislative and rule proposals to allow video remote appearances in most civil court proceedings. (b) Work cooperatively with the ITAC Rules and Policy subcommittee, when needed. <p>Origin of Project: In April 2017, the Futures Commission recommended allowing remote video appearances at trials and evidentiary hearings in civil matters. In May 2017, the Chief Justice directed ITAC to consider feasibility and resource requirements for implementing pilot projects for remote video appearances. ITAC formed the Remote Video Appearances Workstream for this purpose, which issued its final report and recommendations to ITAC, including policy recommendations in August 2019.</p> <p>Status/Timeline: December 2021, effective by January 2022 (Anticipate that legislative proposal would go to the council in January 2021, and to the Legislature in 2021, with rule proposals to be developed concurrently.)</p> <p>Fiscal Impact:</p> <ul style="list-style-type: none"> <input type="checkbox"/> This project may result in an allocation or distribution of funds to the courts. We will coordinate with Budget Services to ensure their review of relevant materials. <p>Resources:</p> <ul style="list-style-type: none"> • <i>ITAC:</i> Joint Ad Hoc Subcommittee on Remote Video Appearances, Co-Chair: Hon. Peter Siggins • <i>Judicial Council Staffing:</i> Information Technology, Legal Services, Center for Families, Children & the Courts, Governmental Affairs • <i>Collaborations:</i> ITAC Rules and Policy Subcommittee; Civil and Small Claims, Family and Juvenile Law, and Probate and Mental Health Advisory Committees 	

IV. LIST OF 2020 PROJECT ACCOMPLISHMENTS

#	Project Highlights and Achievements
1.1	Futures Commission Directive: Intelligent Chat for Self-Help Services (Completed) – The workstream presented its final report to ITAC on May 21, 2020, and to the Technology Committee on June 8, 2020. The recommendations include establishing an intelligent chatbot program to be administered by the Judicial Council, with an advisory board made up of stakeholder representatives from the branch. The Judicial Council accepted the report at its November 13, 2020, meeting.
1.2	Futures Commission Directive: Voice-to-Text Language Services Outside the Courtroom - The workstream presented its final report to ITAC on October 2, 2020, and to the Technology Committee on October 9, 2020. The workstream is currently scheduled to present its findings to the Judicial Council on January 22, 2021. Recommendations include creating a pilot program to test the highest-scoring solution from the workstream’s proof of concept in a production setting; and to emphasize that any court pursuing voice-to-text language services should consider enterprise solutions to ensure data privacy.
1.3	Futures Commission Directive: Remote Video Appearances for Most Non-Criminal Hearings (Completed) – ITAC accepted the workstream’s final report on August 19, 2019, and the Technology Committee approved via email action on November 25, 2019. The recommendations included rulemaking and legislative changes that would facilitate the implementation of digital or video appearance initiatives by local courts. At its September 25, 2020, business meeting, the Judicial Council was provided with an overview of the workstream’s findings, along with a briefing on branch activities over the past year. The council accepted the report.
7	IT Community Development (Completed) - The workstream’s final report was accepted by ITAC on April 20, 2020, and by the Technology Committee on May 11, 2020. Recommendations include identifying ways to increase availability for technology-related training for both staff and judicial officers; to share resources across the branch; and to increase availability of branchwide collaboration tools.
11.1	Rules & Policy Subcommittee – Rule change proposals developed to provide that an electronic filing service provider must allow the party to proceed with an electronic filing even if the party does not consent to receive electronic service. This rule change will go into effect January 1, 2021.
11.2	Joint Ad Hoc Subcommittee on Remote Video Appearances – ITAC, in collaboration with Civil and Small Claims, Family and Juvenile Law, and Probate and Mental Health Advisory Committees, developed a legislative proposal to enact Code of Civil Procedure, § 367.7, to provide statutory authority for courts to permit remote video appearances in any civil actions or proceedings including trials and evidentiary hearings. The proposal was approved for submission to the Judicial Council by ITAC on July 8, 2020, and by the Technology Committee on July 13, 2020. The proposal is currently scheduled for council review at the January 22, 2021, meeting.