

Florida Courts Technology Commission Meeting Summary

May 6, 2016

A meeting of the Florida Courts Technology Commission was held at the Tallahassee Community College Capitol Center in Tallahassee, Florida on May 6, 2016. The meeting convened at 9:00 A.M., Chair Judge Lisa T. Munyon presiding.

Members of the Commission in attendance

Judge Lisa T. Munyon, Chair, 9th Circuit
Judge Martin Bidwill, 17th Circuit
Judge Josephine Gagliardi, Lee County
Judge Terence Perkins, 7th Circuit
Jim Kowalski, Jr., Esq., Jacksonville Area Legal Aid (JALA)
Thomas Genung, Trial Court Administrator, 19th Circuit
David Ellspermann, Clerk of Court, Marion County
Mary Cay Blanks, Clerk of Court, 3rd DCA
Ken Nelson, CTO, 6th Circuit
Karen Rushing, Clerk of Court, Sarasota County
Sharon Bock, Clerk of Court, Palm Beach County

Judge Robert Hilliard, Santa Rosa County
Judge Ronald Ficarrota, 13th Circuit
Judge Scott Stephens, 13th Circuit
Judge C. Alan Lawson, 5th DCA
Laird Lile, Esq., Naples
Murray Silverstein, Esq., Tampa
John M. Stewart, Esq., Vero Beach
Jannet Lewis, CTO, 10th Circuit
Christina Blakeslee, CTO, 13th Circuit
Elisa Miller, Akerman LLP

Members not in attendance

Matt Benefiel, Trial court Administrator, 9th Circuit
Sandra Lonergan, Trial Court Administrator, 11th Circuit

Judge Stevan Northcutt, 2nd DCA
Tanya Jackson, Adam Street Advocates

Supreme Court Justice in attendance

Justice Ricky Polston, Supreme Court

OSCA and Supreme Court Staff in attendance

PK Jameson
John Tomasino, Clerk of the Supreme Court
Brian Peterson
Jeannine Moore

Eric Maclure
Alan Neubauer
Lakisha Hall

Other Attendees

Dennis Menendez, CIO, 12th Circuit
Craig McLean, CIO, 20th Circuit
Steve Shaw, CTO, 19th Circuit
Terry Rodgers, CTO, 5th Circuit
Mike Smith, CTO, 4th Circuit
Gerald Land, CTO, 16th Circuit

Noel Chessman, CTO, 15th Circuit
Robert Adelardi, CTO, 11th Circuit
Fred Buhl, CTO, 8th Circuit
Yvan Llanes, CTO, 18th Circuit
Craig Van Brussel, CTO, 1st Circuit
Carole LoCicero, Thomas & LoCicero

Jon Lin, Trial Court Administrator, 5th Circuit
Melvin Cox, Director of Information Technology,
Florida Court Clerks and Comptrollers
Carolyn Weber, Florida Court Clerks and Comptrollers
Angel Colonnese, Manatee County Clerk of Court
Justin Horan, Clay County Clerk of Court
Harold Sample, Pasco County Clerk of Court
Tony Landry, Volusia County Clerk of Court
Kimberly Stenger, Polk County Clerk of Court
Doris Maitland, Lee County Clerk of Court
Laurie Rice, Brevard County Clerk of Court
Paul Jones, Palm Beach County Clerk of Court
David Winiecki, Sarasota County Clerk of Court
Laurie Reaves, Miami-Dade County Clerk of Court
Brian Murphy, Mentis Technology Solutions

Thomas Morris, State Attorney 8th Circuit
Ken Kent, Florida Court Clerks
and Comptrollers
Jennifer Fishback, Executive Director,
Florida Court Clerks and Comptrollers
Brent Holladay, Lake County Clerk of Court
Mike Phelps, Polk County Clerk of Court
Gerald Cates, Duval County Clerk of Court
Tyler Winik, Brevard County Clerk of
Court
Carole Pettijohn, Manatee County Clerk
of Court
Chris Short, Pinellas County Clerk of Court
Toni Bleiweiss, Lee County Clerk of Court
Ernie Nardo, Broward County Clerk of Court

Judge Munyon welcomed the commission members and other participants to the meeting. She recognized Justice Polston as the Supreme Court liaison to the Florida Courts Technology Commission (FCTC). Judge Munyon called the meeting to order and advised everyone that the meeting was being recorded.

AGENDA ITEM II. Approval of February Minutes

Motion to approve the minutes from the February 11, 2016 meeting of the Florida Courts Technology Commission.

MOTION OFFERED: Laird Lile

MOTION SECONDED: Judge Josephine Gagliardi

MOTION CARRIED UNANIMOUSLY

AGENDA ITEM III. Approval of FCTC Action Summary

Motion to approve the Florida Courts Technology Commission's action summary from the February 11, 2016 meeting.

MOTION OFFERED: Laird Lile

MOTION SECONDED: Murray Silverstein

MOTION CARRIED UNANIMOUSLY

AGENDA ITEM IV. Court Application Processing System (CAPS) Update

a. Alan Neubauer gave an update on the progress of the implementation of the CAPS viewers. Fifty-three counties have implemented their viewer in both the civil and criminal divisions; two counties have implemented in either the civil or criminal division; seven counties anticipate implementing both the civil and criminal divisions by September 2016; two counties anticipate implementing only the civil division by September 2016; three counties do not have an anticipated date for implementing the criminal division; and three counties do not have an anticipated implementation date for either the civil or criminal divisions. Judge Munyon said a county has not fully implemented a viewer until a judge can electronically sign and file orders through the Portal. Alan said his report only includes the number of viewers implemented or available for use in each county without all of the functionality. Judge Munyon requested staff with the Office of the State Courts Administrator (OSCA) distribute a survey to the counties to determine if they have a fully functional CAPS viewer implemented and report the results at the next FCTC meeting.

AGENDA ITEM V. A2J Gateway Triage Pilot Project

Jim Kowalski gave a PowerPoint presentation on the Access to Justice (A2J) Gateway Triage Pilot Project. The [Florida Commission on Access to Civil Justice](#) was charged with seven tasks; one of which was to significantly increase access to justice for disadvantaged, low income, and moderate income Floridians. Regrettably, there is a crisis of access in Florida. Approximately 70-80 percent of Floridians are accessing the civil justice system without an attorney. The purpose of a triage gateway is to have the Florida Justice Technology Center, which is the Switzerland of data. This technology center was formed by a bridge loan from the Florida Bar to the Bar Foundation which is being charged with building the gateway or the hub. The job of the hub is to move the users through the civil justice system and connect them to needed resources. The gateway will provide access to community partners; domestic violence shelters; housing counselors; lawyers and legal aid; court records; self-help articles; and a mechanism to assemble documents. The Supreme Court approved forms will be accessible via mobile devices. The role of the algorithms is to place decisions into a logic tree that lets massive computer systems move everything faster. Jim played a brief video of Introduction to Neota Logic Expert Systems which describes different expert systems that can be created to perform analysis and advice; intake and assessment; intelligent workflow; and document automation. New Mexico has a model being built and the Florida Justice Technology Center plans to harness the resources New Mexico already has in existence. They are using Neota Logic and Pro Bono Net as the two pieces of the model. The video displayed how complicated legal problems on a worldwide scale could be answered in seconds using the power of expert systems. A pilot project was launched in Clay County. For now, the triage pilot will focus on family and landlord/tenant cases. Additional case types will be expanded over a period of time. Clerk Bock asked if the pilot gateway in Clay County will be available throughout Florida. Jim said the gateway will be the online door to Florida courthouses. Clerk Bock asked if interactive forms were going to be created. Jim said interactive forms are available in the DIY project and at www.floridalawhelp.org. The goal of the triage is to connect people to the appropriate forms assembly process and ultimately to the Portal. Clerk Bock asked if there will be multiple entry ways to finding and using forms. Jim said there are many ways to enter the gateway. Clerk Bock asked if the user experience will be simplified and automatically connect to the Portal. Jim said the gateway

is going to tie into existing resources. There are existing document assembly processes that were created by legal aid agencies. The gateway uses a different document assembly system that will be more attractive very soon. It should look similar to the DIY project and seamlessly move into the Portal and work together with all of the systems that have been built. Clerk Bock asked if any costs were associated with using the system. Jim said the Supreme Court has directed that fees should not be charged to users of the system. The funding for the triage comes from a bridge loan from the Florida Bar to the Bar Foundation. Two million dollars was set aside to establish the Florida Justice Technology Center.

AGENDA ITEM VI. Portal Progress Report

a. Carolyn Weber discussed the Portal usage statistics. In the month of April, there were 1,198,652 filings through the Portal, of which 1,193,762 were submissions to the trial courts; 1,149 were submissions to the Department of Corrections (DOC); 3,000 were submissions to the Second District Court of Appeal; and 741 were submissions to the Florida Supreme Court. Judges in Indian River, Martin and Bay counties have agreed to accept proposed orders electronically through the Portal. Approximately 1.94% of filings were placed in a pending queue to be returned to the filer for correction. The filer can correct and resubmit the document, keeping the original file date and time stamp, or submit a new document generating a new file date and time stamp. If the filer chooses the latter, the clerk eventually updates the status to Filed for Judicial Review. At that time, the filer can no longer update the submission. Roughly 23,151 submissions were in the pending queue for returns to the filer. Carolyn discussed the number of documents returned to the filer for corrections by filer role and the percentage of the documents that were actually resubmitted as opposed to submitting a new document. These statistics assist the Florida Court Clerks and Comptrollers (FCCC) in determining where they need to provide more training on how to resolve filing through the pending queue. The number of self-represented litigants continue to increase. Mary Cay Blanks inquired why the number of registered self-represented litigants was significantly higher than the number of submissions. Carolyn stated sometimes the self-represented litigant only file one time. Judge Munyon asked how long a filer's account stays active and Carolyn replied forever. Carolyn also went over the projects the FCCC is currently working on. Criminal e-filing is pending implementation in Pasco County; the FCCC is working with system-to-system e-filing with third party vendors; a new release is scheduled for October 2016; working with the Supreme Court and the District Courts of Appeal to convert to eFACTS; working with the DOC to assist them with submitting proposed violation of probation (VOP) warrants to the judges; adding A2J interviews to the Portal to assist self-represented litigants; and providing technical support and training to the judiciary regarding proposed orders.

b. Carolyn Weber gave an update on the Portal service desk. The service desk takes calls regarding customer service incidents along with technical and system support incidents. Roughly 3,081 customer service incidents were received during March 2016. On average it took 32 minutes to respond to an incident and 1 hour and 49 minutes to resolve an incident. Roughly 575 technical/system support incidents were received during March 2016. On average it took 18 minutes to respond to an incident and 4 hours and 45 minutes to resolve an incident. Carolyn showed the top 10 types of incidents the service desk receives from attorneys, judges and pro se filers. She also provided statistics on those types of incidents.

AGENDA ITEM VII. Demonstration on Proposed Order Functionality

Carolyn Weber gave a demonstration on filing proposed orders through the Portal. Judges have a workspace that allows them to review and process proposed orders. There is an icon that differentiates a corrected filing from an original filing. This lets the judge know the document they sent back to the filer has been corrected and returned. The judges have options to download, email, or print orders. Karen Rushing asked how the document types are established. Carolyn said the filer chooses the type of proposed order they are submitting. In June 2016, the FCCC plans on adding a sign and file button to the proposed order module. The judge's signature will be embedded and the document will be filed into the case. A judge can also remove a document from their queue without filing it. Mary Cay asked if a document will be lost if it is removed from the queue. Judge Munyon said on occasions judges receive orders that they do not sign. If a judge decides not to sign a proposed order it is removed from the queue and deleted. Karen said there should be a failsafe process to require a notation before deleting proposed orders from the queue to ensure the court does not unintentionally delete a document. Judge Perkins asked if proposed orders could be processed through the CAPS viewers. Carolyn said the CAPS vendor could integrate with the Portal and accept the orders. Laird Lile asked if the filer of the proposed order has the ability to link the order to an existing item. Carolyn said the proposed order does not link back to the docket sheet or a document within a case; however, there is a title document field that allows free text where the attorney can put information regarding the document and that goes back to the judges. Laird suggested a future enhancement that allows the filer to link documents. Judge Perkins said most judges use their viewer and asked why he would ever use the Portal to file a proposed order. Judge Bidwill said each circuit, at its own pace, will have the ability to interface with the Portal; therefore, allowing the orders to be pulled into the viewer. Judge Munyon said judges should not have to go to the Portal to pull information once the CAPS viewers are fully functional. The need for task switching will be alleviated. Carolyn said the judges or judicial assistants should receive a prompt alerting them that a proposed order has been submitted. Murray Silverstein said there is a great disparity around the state with regards to county funding for viewers. Unfortunately, all of the circuits or counties do not have a CAPS viewer. In essence, using the Portal allows judges to file proposed orders without a viewer. Murray also said it is a bad practice to encourage judges to print, sign, and scan a document. He asked if a macro could be developed that will conform with the technology standards on judges signatures. Carolyn said she could show that capability at the FCTC meeting in August. Carolyn also demonstrated an attorney's ability to file a pleading to the clerk or a proposed order to a judge. Attorneys can serve the documents from here as well. Laird asked if cover letters would be added to the Portal. Carolyn stated the cover letters will be added in June 2016. The cover letters will be in PDF format that could be attached to proposed orders. Judge Scott Stephens suggested adding a data field that gives limited choices (i.e., all parties have agreed, or they disagree and will send a competing proposed order). A tool tip could be displayed with this information; thereby, allowing the judge to sign the proposed order immediately reducing the processing time.

AGENDA ITEM VIII. Standards for Third Party Vendor Update

Carolyn Weber said the FCCC is continuing to work with third party vendors. The documentation for

the specifications is almost complete, but the FCCC has not had a chance to do an end-to-end test. Tom Hall is reviewing the legal documentation. As soon as this is done the FCCC will be ready to present the standards to the E-Filing Authority Board and the FCTC.

AGENDA ITEM IX. Appellate Portal Interface Update

John Tomasino stated the Second District Court of Appeal and the Supreme Court have the ability to accept filing fees through the Portal.

AGENDA ITEM X. Portal Subcommittee Update

Judge Bidwill said at a previous meeting, the state attorneys and public defenders made a request for the ability to receive e-service via a web service as opposed to individual emails. Rule 2.516 requires email service. The FCTC/RJA Joint Workgroup is looking at modifying the rule to oblige this request. The FCCC is going to develop the specifications necessary to accommodate this request and report back at a later meeting. Murray Silverstein said at the time the language in Rule 2.516 was drafted, email service was not intended to be a limitation; yet, it is viewed as a potential limitation because the phrase “web service” was not used. Email service is sending the PDF by email and e-service is sending a link via email that once clicked will take you directly to the document. Tom Morris said the state attorneys and public defenders would like the document to come directly to their system bypassing the use of email. Using web service eliminates spoofing email addresses, size limitations, etc. The goal is to have this service work similar to the CAPS viewers. Murray said if the motion is approved, the referral will be made to the RJAC and language will be submitted to the court for consideration. The details and specifications required will be added to the technology standards, while the conceptual language will be added to the rule. The current language in the rule should not be viewed as a limitation or a constraint. Judge Lawson asked if the current request only applies to governmental entities. Murray said yes for now, but large law firms will want the same functionality. Judge Bidwill said the FCCC will build the foundation in the Portal and go from there. Judge Lawson asked if there was a concern with people inundating the Portal with solicitations. He asked if a limitation should be established to control who can use the service. Murray stated he thinks a fee should be charged for the added feature. Judge Munyon said the Court and the E-Filing Authority Board could decide if the service should only be offered to government entities if they do not believe it is fair for the taxpayers to pick up the tab for private for-profit corporations using those resources. Justice Polston said there needs to be a distinction between web-based service, email, and e-service. The rule should contain broader language for electronic means of service and the technical standards should include different ways service can be accomplished. Laird Lile said Rule 2.516 already allows for service through an e-service system that includes sending an email with a link to a website. He is concerned with making a recommendation that is too specific. Murray said the reference to the link is e-service. Presently, service is done by email. Web-based service is not covered by Rule 2.516. Mary Cay Blanks said the motion is too specific. Murray said the motion does not require language to be developed, instead the motion is to refer the issue to the RJAC to review the current language and decide if tweaking needs to be done.

Motion to recommend the FCTC to refer to the RJAC that Rule 2.516 (Service Rule) be considered for possible amendment to include web-based service, in addition to service by email and e-service.

MOTION OFFERED: Murray Silverstein

MOTION SECONDED: Clerk Karen Rushing

MOTION CARRIED

Judge Stephens said the FCTC will have a chance to review the proposed language change once the RJAC looks over the current rule and decides if the language needs to be tweaked.

AGENDA ITEM XI. DOC Joint Workgroup Update

Judge Bidwill said a workgroup consisting of FCTC members and representatives from the DOC to examine if efficiencies could be gained from the interaction between the judiciary and the DOC in certain areas. The workgroup examined the possibility for the judiciary to make the process of receiving, approving, and filing proposed VOP community controlled warrants electronic. The Thirteenth Judicial Circuit worked with the DOC to develop a warrants program that has been working for two months. Carolyn Weber created a proposal for processing VOP warrants. The VOP warrants would be routed directly to the judicial circuit and to the judicial officer; different DOC organizations would be set up as they are established; the DOC would have control over the organizations and have the ability to add probation officers to their organization to allow the filings; and the clerk would link the documents to the filer role enabling them to submit proposed warrants to the judicial officer and any document that needs to be filed with the clerk to the clerk's office. The FCCC would implement this feature in a phased-in approach allowing the circuits and counties to be added when they are ready. The goal is to have the warrants received and approved through the CAPS viewer. A secure pipeline is already set up for submissions to the DOC.

Motion for the FCTC to allow the FCCC to work with the DOC on moving forward with implementing proposed warrant submissions through the Portal. The next step would be for the E-Portal Authority Board to consider the proposal and allow the FCCC and the DOC to move further on the project.

MOTION OFFERED: Judge Martin Bidwill

MOTION SECONDED: Judge Alan Lawson

MOTION CARRIED UNANIMIOUSLY

The workgroup also discussed allowing the judiciary to receive electronic filings from the DOC. The judiciary has to send paper documents and post-conviction rulings back to the litigant at the prison and the attachments can sometimes be voluminous. Additionally, at times the DOC is responsible for storing paper copies of the records on appeal. The workgroup brainstormed different ideas of electronically storing the records on appeal in a format that allows for electronic access in a prison setting. The DOC is interested in continuing the dialog. Clerk Rushing went back to the discussion of VOPs. Typically the affidavit is filed and the warrant is presented to the court. The court relies on the

affidavit to make a decision. She asked if the affidavit would accompany the warrant. If so, and the court does not sign the affidavit, the affidavit is not recognized as filed. Judge Bidwill said if someone is in custody the DOC does not need a warrant and can just file the affidavit with the clerk. However, if a separate arrest has not occurred, he does not think the affidavit will be given to the clerk at the same time the judge receives an affidavit and warrant. The workgroup and the DOC needs to discuss what goes back to the clerk once the court approves the warrant. Clerk Rushing said the record laws need to be followed as well. Is an affidavit considered a record even if it is not signed by the court? Judge Bidwill said it would probably be a public record with the DOC. If a warrant is rejected, there would be an electronic response to the DOC. Chris Blakeslee said the Thirteenth Judicial Circuit will send the report, affidavit, and warrant back to DOC if something is rejected. Judge Bidwill said oftentimes there are time lags between a submission of a claim of VOP and the electronic system would improve the time between submission and approval. Carol LoCicero said there is a significant issue if there is not a record of the court receiving the record. Those records should be accessible in the judicial system. Simply returning the records to the DOC is a problem.

AGENDA ITEM XII. Judicial Review Workgroup Update

Judge Gagliardi said the workgroup was tasked with analyzing standard 3.1.13 Local Document Receiving in the *Standards for Electronic Access to the Courts*. Approximately 95% of the documents in the queue never get corrected. The workgroup will work on determining what kind of documents are in the queue and develop a timeframe the documents can remain in the queue. The workgroup respectfully requested to change the name to coordinate with its charge. Judge Munyon stated the name of the workgroup is a misnomer. The filings in the queue never go to a judge for review.

Motion to change the name of the workgroup from Judicial Review Workgroup to Abandoned Filings Workgroup.

MOTION OFFERED: Judge Josephine Gagliardi

MOTION SECONDED: Laird Lile

MOTION CARRIED UNANIMOUSLY

AGENDA ITEM XIII. Interpreter Data Workgroup Update

Tom Genung said the workgroup has been trying to figure out a way to capture the need for an interpreter up front. The workgroup decided the best option to capture this information is for the fields to be available and populated in the case maintenance system. The majority of the counties are able to capture the interpreter need data. The workgroup discussed the need to uniformly capture the data across all divisions in all counties. The Twentieth Judicial Circuit has an administrative order requiring the capturing of that information and the workgroup discussed doing the same on a statewide basis. The workgroup cannot move forward until it can determine the best way to capture the data. The workgroup may enlist the Commission on Trial Court Performance & Accountability to assist in the analysis.

AGENDA ITEM XIV. CCIS Subcommittee Update

Judge Perkins gave an update on the work of the CCIS Subcommittee. The subcommittee oversees the CCIS user interface. The subcommittee is trying to identify related party information to develop related case information for use in unified family courts and perhaps other case specific divisions. The process involves three steps: 1) identify the information that is currently being captured and figure out how additional information, if necessary can be captured; 2) decide how to develop the search algorithms to acquire the information in a useful way; and 3) decide how to display the information to the court, clerk, and possibly the parties. The workgroup is finalizing a survey of the clerks to determine what information is captured.

AGENDA ITEM XV. Access Governance Board Update

a. Judge Hilliard briefly discussed the request from three counties to move their online electronic records access system from the pilot phase into production. He offered two motions to be voted on simultaneously.

Motion for the FCTC to make a recommendation to the Supreme Court that Clay and Palm Beach counties move their online electronic records access system from the pilot phase into production and to discontinue the submission of monthly progress reports be approved. Within 90 days from the Court's approval, the clerk must implement their access system in accordance with AOSC16-14.

Motion for the FCTC to approve Miami-Dade County's request to move Phase II of their online electronic records access system from the pilot phase into production and to discontinue the submission of monthly progress reports within 90 days of the FCTC's approval.

MOTION OFFERED: Judge Robert Hilliard

MOTION SECONDED: Laird Lile

MOTION CARRIED UNANIMOUSLY

b. Judge Hilliard requested permission to defer voting on Monroe County's request to withdraw their *Online Electronic Records Access* application until the Board could further review the request.

c. Judge Hilliard discussed a letter received from the Odyssey Counties of Florida requesting an extension of time to implement docket numbering.

Motion to approve Odyssey Counties request for an extension to implement docket numbering.

MOTION OFFERED: Judge Robert Hilliard

MOTION SECONDED: Clerk David Ellspermann

MOTION CARRIED UNANIMOUSLY

Judge Hilliard said the Board considered a few additional items at its May 5, 2016 meeting and would like the FCTC's approval. The Board was informed that a couple of the viewable on request (VOR) items on the

Access Security Matrix are not highlighted like the others. Judge Munyon asked if this was something that would need to go to the Supreme Court for approval and Justice Polston replied no.

Motion to highlight the County Criminal Appeals Sexual Abuse and Parental Notice of Abortion rows in the Access Security Matrix to indicate they are viewable on request (“VOR”).

MOTION OFFERED: Judge Robert Hilliard
MOTION SECONDED: Judge Scott Stephens
MOTION CARRIED UNANMIOUSLY

Judge Hilliard said AOSC16-14 did not include language indicating the public defenders would have attorney of record access so long as there was not a notice of appearance or an order withdrawing them on a giving case. At the Board’s February 10, 2016 meeting, a motion was approved stating, “Public defenders will be granted access to defined case types where the statute defines them and grants them party access where the public defender is specifically assigned or no attorney has been assigned. Access will be demoted to General Government and Constitutional officers when the public defender is no longer counsel of record or another attorney is assigned. . .”

Motion to submit the motion from the Access Governance Board’s February 10, 2016 meeting to the Supreme Court for approval and have the *Standards for Access to Electronic Court Records* reflect such as well as the attorney of record.

MOTION OFFERED: Judge Robert Hilliard
MOTION SECONDED: Clerk Karen Rushing
MOTION CARRIED UNANMIOUSLY

Judge Hilliard said the Board discussed if law enforcement from other states should have access to Florida records. After much discussion, the Board decided to change the definition of law enforcement in the *Standards for Access to Electronic Court Records*.

Motion to change the definition of certified law enforcement to read, “Federal law enforcement agencies and all Florida law enforcement agencies, including but not limited to, Florida state attorneys’ offices and the Florida state attorney general’s office.”

MOTION OFFERED: Judge Robert Hilliard
MOTION SECONDED: Judge Alan Lawson
MOTION CARRIED UNANMIOUSLY

AGENDA ITEM XVI. Data Exchange Workgroup Update

Robert Adelardi said the Data Exchange Workgroup developed draft data exchange standards for interaction between the Clerk CMS, the CAPS viewers, and the state level Judicial Data Management Services system. The standards were shared with vendors to receive feedback. The workgroup received and handled clarifying questions from Miami-Dade Clerk of Courts. In addition, Mentis Technologies

requested inclusion in the grandfather clause due to possible noncompliance with the data exchange standards.

Motion to adopt the *Data Exchange Standards*.

MOTION OFFERED: Judge Scott Stephens

MOTION SECONDED: Clerk Karen Rushing

MOTION CARRIED UNANIMOUSLY

AGENDA ITEM XVII. Document Storage Workgroup Update

Steve Shaw said approximately six months ago the Document Storage Workgroup developed a draft set of standards. The workgroup decided to remove font size, filing size, ADA references, and anything that does not specifically relate to how documents should be saved from the standards. The workgroup deals with document storage and not document creation. Plans are still imminent to work with the Florida Bar on educating attorneys. Steve anticipates that the workgroup will have a set of standards to present to the FCTC at its August meeting.

AGENDA ITEM XVIII. Technical Standards Subcommittee Update

Jannet Lewis said the Technical Standards Subcommittee has been diligently working on updating the Integration & Interoperability (I&I) document. The I&I is one of the oldest technical standards documents used by court technology officers. The document identifies the minimum requirements for hardware and software and is used to request county funding for information technology equipment. Jannet did not go into grave detail on all of the changes made by the subcommittee; however, she did point out that the subcommittee removed the data exchange portion from the document because a standalone data exchange document has been created and she stated the cloud section had been updated. Jannet detailed the approval process, the risks, storage restrictions, best practices and resources in the cloud section. OSCA's general counsel reviewed the cloud section and approved the changes.

Motion to adopt section 3.4 Cloud Computing in the *Integration & Interoperability* document.

MOTION OFFERED: Jannet Lewis

MOTION SECONDED: Judge Alan Lawson

MOTION CARRIED UNANIMOUSLY

AGENDA ITEM XIX. Electronic Notary and Certification

Judge Munyon skipped this agenda item and stated she referred the topic to a subcommittee for vetting before it comes to the FCTC for discussion.

AGENDA ITEM XX. Standards Consolidation Workgroup Update

Jannet Lewis said a lot of the standards workgroups are updating their standards. The Standards Consolidation Workgroup will combine all of the technology standards into one document. Jannet hopes to present the consolidated standards to the FCTC in August for approval.

AGENDA ITEM XXI. FCTC/RJA Joint Workgroup Update

Murray Silverstein said the workgroup is working closely and collaborating with the Standards Consolidation Workgroup. Judge Stephens briefly discussed what the RJAC was doing with Rules 2.515 Signature and Certificates of Attorneys and Parties, 2.516 Service of Pleadings and Documents, and 2.525 Electronic Filing. The RJAC is trying to make the rules match the reality that has emerged since the Portal is the central filing facility. The current rules were created when the RJAC had to guess the ultimate form the e-filing system would take. Judge Stephens hopes to have a document presented to the FCTC at its August meeting.

AGENDA ITEM XXIV. Other Items/Wrap Up

Judge Munyon recognized Judge George Reynolds for his dedication and service to the FCTC. Judge Reynolds was integral to everything the Commission accomplished since his involvement. Judge Reynolds was presented with a plaque for his commitment to the FCTC and the judicial branch. Laird Lile congratulated Judge Reynolds on his career as a judge and spoke briefly on how Judge Reynolds welcomed him to the Commission. He also commended Judge Reynolds for his involvement in bridging the discussions between clerks, technologists, practicing lawyers, and the like. The Bar is appreciative for the work Judge Reynolds has done over the years. Chris Blakeslee spoke about Judge Reynolds on a professional and personal level. She said Judge Reynolds has always had great insight and input on all of the projects he has been involved in. Justice Polston spoke about his appreciation for Judge Reynolds' demeanor and professionalism toward the Florida Bar as a practicing lawyer and toward the people of his circuit as a judge. Judge Reynolds has done an outstanding job on the bench and as a member of committees he has served on. Justice Polston discussed his admiration and respect for Judge Reynolds. Judge Reynolds complimented the FCTC for its progress towards achieving the goals it was tasked with. The FCTC is the best reflection of cooperation within the state and within the judicial branch. The court and clerks made a lot of progress to benefit the public. Judge Reynolds said he was honored to serve on the FCTC.

Judge Munyon advised everyone the next FCTC meeting is scheduled for August 17-18, 2016 in West Palm Beach.

Motion to adjourn the FCTC meeting

MOTION OFFERED: Judge Alan Lawson

MOTION SECOND: Chris Blakeslee

MOTION CARRIED UNANIMIOUSLY