

Oregon eCourt

The QUARTERLY

Oregon Judicial Department

Jackson Leadership Uses Whole Court Engagement Approach to Oregon eCourt Implementation

by Eve Dedek, Staff Writer

On March 11, 2013, Jackson County Circuit Court became the final early adopter - and largest court so far to implement the Oregon eCourt Case Information system. The Jackson "go-live" brings the number of state circuit courts providing Oregon eCourt services to five, with three more courts (Clatsop, Columbia, and Tillamook) preparing to go live in August 2013.

As each go-live is completed, the Oregon eCourt Program applies additional refinements and expertise to the process as it prepares court staff and judges, configures business processes, provides training, schedules support presence,

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Foreground - Jackson Circuit Court Presiding Judge Lorenzo A. Mejia using Oregon eCourt Session Works Judge Edition; Background - Jackson judges and staff attending training classes and lab sessions.



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Oregon eCourt's Odyssey software training at Jackson County Circuit Court in preparation for Oregon eCourt Case Information system implementation.

and completes technical readiness for the implementation (equipment installation, upgrades, partner integrations, data transfer from the old system to the new, etc). The Jackson implementation produced fewer deployment and data migration issues (most characterized as minor), and court staff and judges were able to adapt to the new system and achieve normal court operations speed quicker than earlier implementations. Public Access availability was ready to be activated one week earlier than in any previous go-live event.

Jackson County Circuit Court derived a portion of its go-live success from the accumulated gains in knowledge that Yamhill, Crook, Jefferson, and Linn contributed to the implementation process, along with the latest developments in training – including more guided lab sessions and some one on one training the weekend of go-live, an expanded Help-System, and a more seasoned go-live strategy overall. But in addition to inherited

implementation processes, Jackson also employed several internal preparation processes that optimized their court's readiness.

To get a first-hand view of how a circuit court operates using the new system, Jackson's Presiding Judge Mejia and Judge Gerking traveled to Linn County Circuit Court, which went live with the Oregon eCourt Case Information system in December 2012. Presiding Judge Murphy of Linn County Circuit Court hosted the visit and provided advice, tips, and a copy of the lessons learned from Linn's implementation process.

Jackson leadership decided early on to facilitate the participation and engagement of all court staff and judges through courtwide sharing of all Oregon eCourt information, recognizing that the implementation would be more successful if everyone was part of the process. Jackson's local subject matter experts (SMEs) obtained Odyssey training prior to the start of court staff

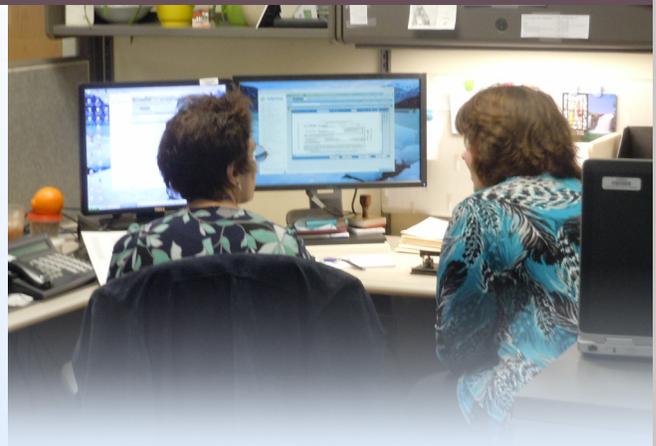
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Saturday morning all-court meeting kicks off the weekend implementation of Odyssey (the software which powers the Oregon eCourt Case Information system). Jackson TCA, Bob Kleker, reviewing what the court has done to prepare, and what will be done over the weekend. Other presenters at the meeting included Presiding Judge Mejia, Scott Smith, Oregon eCourt Program Director, Bryant Baehr, CIO/ETSD Div Director, and Bryan Hartman, Tyler Technologies Senior Project Manager for the Oregon eCourt implementation.



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Lab sessions specifically designed for judges (L) and Jackson staff working with the new system a day after go-live (R).

and judges training so that they could begin configuring their local business processes, and took that training a step further by giving staff and judges demonstrations on Odyssey processes, providing them with early exposure to the new system prior to scheduled training.

Jackson's TCA, Bob Kleker, (throughout the course of other implementation duties) took on the task of monitoring all events, meetings, and decisions related to safeguarding the court's case register and the contents of the case management system. Court supervisory staff reviewed and documented all new business processes so that, if needed, staff could reference a set of authoritative directions to help them

complete the new processes correctly. During go-live week (March 11-15), Jackson set up auditing queues to double check data entry and scanned sentencing and disposition documents as they were put into the new system.

Jackson's efforts originated out of the engagement of court leadership and subsequently, court staff. As the fourth and final early adopter, Jackson's success at executing a "whole court engagement" is a notable milestone in Oregon eCourt's growth of implementation know-how - as we take it forward to deploy the system in OJD's remaining courts. ■

OJD Presentations on File & Serve

As each Oregon circuit court draws closer to implementing Oregon eCourt's Case Information system and subsequently, the File & Serve system, OJD is contacting local bar associations in those counties to arrange outreach presentations.

The presentations provide information on what File & Serve will mean for local attorneys and law firms, what they need to do to be ready for the implementations, and will give attendees an opportunity to discuss any issues or concerns. ■

5 Courts and Counting...

As of March 11, 2012, the following courts have implemented Oregon eCourt's new Oregon eCourt Case Information System (Odyssey):

Yamhill County Circuit Court
Linn County Circuit Court
Crook County Circuit Court

Jefferson County Circuit Court
Jackson County Circuit Court

Clatsop, Columbia, and Tillamook will go live in August 2013. ■



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Jackson County Circuit Court - One Month After “Go-Live”

by Robert Kleker, Jackson TCA, and Terri Galedrige, Analyst 2/Mgmt Asst.

March 11, 2013 ended one journey and began another for the First Judicial District. On March 11, the Jackson County Circuit Court ventured into the electronic file era when Odyssey became a reality.

To prepare for our new journey on March 11, court staff and judges participated in Odyssey system training for the previous five weeks. The first four weeks of training dealt primarily with learning the Odyssey program, with the last week dedicated to “labs” which allowed staff to apply their work procedures and processes to their new work environment.

Finally on Wednesday, March 6, reality started to set in. Oregon eCourt Teams from ETSD, BFS, OETO, and Tyler Tech worked late into the night migrating OJIN/FIAS data into Odyssey. This created a “black out” for Jackson County staff and judges on Thursday and Friday as OJIN/FIAS was unavailable as data was being converted from OJIN, FIAS, LaserFiche, and OnBase. Staff and judges had to revert back to manual systems, i.e., receipting, no ability to produce calendars or criminal judgments, filings accepted - but not docketed, etc. A great way to test your Business Continuity Plan!

To ready ourselves for leaving OJIN and begin using Odyssey on March 11, Oregon eCourt Teams, Tyler Technologies, Jackson County staff and judges worked Saturday, March 9 and Sunday, March 10. Work included setting up calendar sessions, entering case information

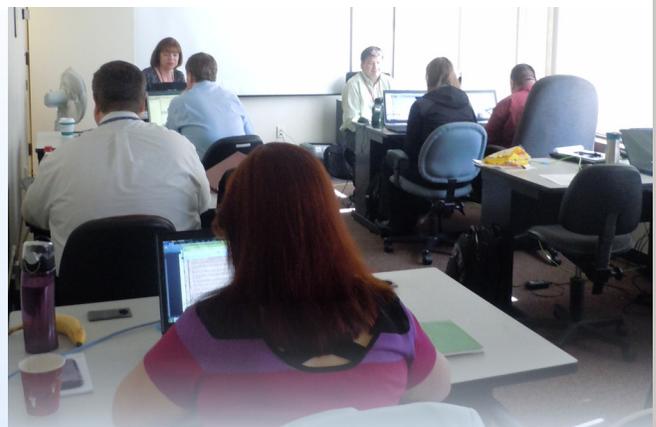
and filings received while OJIN and FIAS was unavailable, and verifying that operational components were functioning correctly.

Saturday started with a kickoff meeting at 8:00 a.m. Directions were given to staff before they headed off to their workstations to start working with the new Oregon eCourt case information system. At the kickoff meeting, Julie Traverse, our Oregon eCourt Project Manager, was recognized for her hard work and dedication working through our business processes, preparing staff and judges for the conversion to Odyssey, and for the numerous trips she took up and down I-5 over the past 2 years during the configuration process.

Finally, Monday, March 11, arrived. It was obvious that our preparations paid off. ETSD and a few other Tech Support staff from trial courts had our hardware ready to go; Tyler and OETO trainers were standing by to assist when help was needed; BFS staff were stationed behind cashiers so the public could be served quickly and without a noticeable difference from the week before. Security rights and roles in Odyssey are very different and much more complex than OJIN; addressing the rights and roles on Sunday made Monday’s transition with the public much smoother.

For three weeks after coming up on Odyssey, various members of the Oregon eCourt teams and Tyler Technologies worked with us. They remained on site in Jackson County providing

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Jackson County Circuit Court judges take Oregon eCourt Odyssey software training (L). Tyler, ETSD, BFS support staff (R) holding down the War Room during Go-Live week.



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support and assistance to staff and judges as we became more comfortable with day-to-day processes. Public access to Jackson County Court information was made available on Monday, March 18, one week earlier than scheduled.

Today, weeks after “go live” and after onsite support have left us to venture on our own, the Jackson County Court is settling into our new environment. Sure, we still come across some issues, but staff and judges are becoming more familiar with the capabilities and functions of Odyssey which makes the experience more bearable and adventuresome.

Judges like working in Judge Edition. Although initially concerned that files back scanned into Odyssey come across as one large file, they have learned that they can look through the electronic file much quicker than a large paper file to find a particular document. Staff comments have included: “Odyssey is a good program, even with the issues that we come across” and “I like working in Odyssey, it is actually kind of fun.”

Jackson County judges and staff realize that our journey is not over, but rather just begun. However, we are glad to have left the station and look forward to helping other courts begin their journeys. ■

Implementation Quotes From Linn County

Linn County Circuit Court went live with the Oregon eCourt Case Information system on December 12, 2012. The QUARTERLY has collected several Linn County Circuit Court quotes on Oregon eCourt implementation to pass on to other OJD courts.

Presiding Judge Daniel Murphy, Linn County Circuit Court on Oregon eCourt Implementation Process:

“One thing that I must stress is the attitude and message that the court’s leadership portrays. The PJ especially, the TCA and the other judges, the other management staff must remain positive and supportive of this transition if you want to have success. Nothing will poison the well faster than someone in the hierarchy who is negative.”

“....there is a natural tendency for people to want to continue to do things the old way. There are two significant problems with that and Oregon eCourt. First, this is a digital system and for the most part does not rely on paper. We do things much differently with a computer system than we do with paper. Perhaps the biggest misuse of resources occur when we try to “pave the cow path” and do with a computer system what we used to do with paper. The other problem is that Odyssey is designed to work well with certain procedures and processes. If we do not follow those it makes things all the more difficult. I urge you and your staff to keep an open mind and embrace the change as much as possible. It has worked well for us.”

Judge Michael Sullivan, Plan B Judge, Linn County Circuit Court on Using Odyssey:

“During this last week I have been assigned as a Plan B Judge in Linn County. This County is in the process of implementing ecourt. I arrived at 8AM on Monday morning and received about 30 minutes of instruction from Judge Murphy on how to use Odyssey. I am pleased to report I was able to perform my duties as Trial Judge with no difficulty using the new process. In some ways the new program is more desirable as there is a summary of all documents in the digital file that make it easier to go to needed information. The documents can be expanded on the screen to view critical language. I realize I have not done criminal arraignments or had files sent to me for signing orders or judgments but it appears workable. Just thought you would be interested in my first impression of going digital and it has been favorable.” ■



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Pilot Law Firm: “File & Serve A Great System for Oregon Courts and Attorneys”

By Karin Moshier, Associate Attorney, Haugeberg, Rueter, Gowell, Fredricks & Higgins, P.C.

Haugeberg, Rueter, Gowell, Fredricks & Higgins, PC in McMinnville, Oregon is excited to have been selected as one of the first firms to try Oregon’s File & Serve program during Yamhill’s pilot phase. We have been working with the Yamhill County Circuit Court, OJD, and Tyler since early November 2012 to learn how to use the Odyssey File & Serve system. We completed our first eFiling on November 15, 2012, and have successfully eFiled 49 documents in Yamhill County. We have filed initial documents for new cases as well as subsequent filings in existing cases.

Our advice to attorneys who are trying the eFiling system for the first time is to stay positive and be patient. As with any new system, there is a learning curve. The first time that you use the eFiling system, it may take longer than filing a paper document at the courthouse. Based on our experience, however, once you are accustomed to the system, it will be faster and easier than filing paper documents at the courthouse.

There are many ways in which Oregon attorneys will benefit from using the Odyssey File and Serve System. eFiling will be more convenient to attorneys than the traditional

form of filing. eFiling will allow attorneys to complete all the steps of filing documents without leaving their desks. Attorneys will be able to prepare documents, sign the documents, file the documents with the court, pay the filing fee, serve opposing counsel, and send courtesy copies to clients – all with a few clicks of the mouse.

In addition, eFiling is available anytime. Attorneys are not limited to filing during court hours; they can file documents with the court in the evening and on the weekends from any location with Internet access.

The File & Serve system will encourage paperless offices. Not only will attorneys not need to print paper copies of documents they file because the documents will be filed and served electronically, they will receive documents from opposing counsel in electronic form as well. Running a paperless office not only benefits the environment, it reduces costs of printing, mailing, paper, and storage space.

We are excited for the “Go-Live” date for the File & Serve system. We believe it will be a great system for Oregon courts and attorneys.



Front: Norma Herigstad, Stefanie May; Middle: John Stirling, Barbara Werner, Megan Maynard, Cindy Albrandt; Back: Gary Rueter, Doug Fredricks, Traci Yocom, Rob Higgins, Karin Moshier, Sandra Galati, Sam Justice, Walt Gowell, Lorraine Mendonsa; Not Pictured: Dianne Haugeberg, David Haugeberg, Sandy Parr, Raelynn Mays



eFiling Services Now Available in Yamhill and Coming May 13 to Three Other Courts

by Eve Dedek, Staff Writer

The Oregon Judicial Department went live with File & Serve services in Yamhill County Circuit Court on April 1, 2013, allowing Oregon attorneys and other filers to eFile, serve, distribute and deliver court documents, and pay filing fees for many types of cases.

Crook, Jefferson, and Linn circuit courts are currently piloting File & Serve and are on schedule to go live with the service by May 13, 2013. Jackson County Circuit Court will pilot File & Serve in May and will go live in June 2013. Clatsop, Columbia, and Tillamook circuit courts will have File & Serve services by October 2013.

Each Oregon circuit court will confirm that it is ready to go live with the service after completing a pilot phase, where one or more law firms are selected to participate in testing to verify the stability of the File & Serve system. Pilot law firms will initiate civil and other types of cases, file documents into existing cases, and perform electronic service through the live File & Serve system.

Both pilot firms and court staff will receive training in File & Serve provided by Oregon eCourt's single-solution provider, Tyler Technologies, who also power the File & Serve system, through their Odyssey software program.

As File & Serve opens in each court, users will be able to register for live online training webinars and will have access to self-study online training materials, quick reference guides, user guides, and support systems (including an Online Chat service). These training tools are conveniently located on the File & Serve website portal under the "TRAIN" and "LEARN" sections. The online webinars and training materials are user-friendly and free – new users are responsible for taking the training before registering and attempting to use the File & Serve system.

James Wollenweber, Project Manager for the File & Serve project, reports that pilot law firms are saying that the system is "easier to use than we had anticipated." Since going live with eFiling in Yamhill, over 221 filings have been sent through the OJD eFiling system.

"The system is working well," says Wollenweber, "most anomalies that were discovered during the pilot phase have been easily corrected with minor configuration changes. File & Serve is fairly configurable and here in Oregon we have added or removed several fields based on both pilot law firm and court feedback. For example, we've added a field that will auto-calculate court fees based on claim amounts or estate values entered."

In the future, self-represented eFilers will be able to use a system of forms and instructions that will be developed to help them negotiate the File & Serve system. Wollenweber explains that the Oregon Judicial Department is working with Oregon eCourt's single-solution provider, Tyler Technologies, "to introduce a wizard-based system that will ask a self-represented eFiler a series of questions that are designed to help them select and fill out the correct forms to eFile and get them started with the File & Serve system."

The File & Serve portal is accessed through the OJD eFiling website: <http://courts.oregon.gov/OJD/OnlineServices/OJDeFiling/Pages/index.aspx>

See a list and description of the File & Serve self-study training classes on the next page:

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File & Serve “Self-Study” Online Training Classes

Class Title	Description	Length of Class
Introduction	Purpose, benefits, workflow processes for eFiling and eService, Browser requirements	4 Minutes
Access and Registration	Registration, Log-in, System messages and notifications, Contacting support, Online training tools, Different types of users	5 Minutes
Basics and Administration	Logging in, Navigating workspace tabs, Changing passwords, Managing your account, Editing user information, Adding and approving new users, Payment account types, Adding credit card information, Managing case information – case status, filing details, searching, bookmarking cases, Adding service contacts	7 Minutes
Electronic Filing	Step-by-step process to enter new cases, Entering party details, Entering filing details, Fees, Payment details, Uploading documents for filings, Processing and submitting the filing, Filing supplemental pleadings	8 Minutes
Electronic Service	Managing your Service Contact List – adding to, modifying, deleting contacts, replacing contacts, Adding a service to a case, Adding or removing contacts to and from a case, Opening notifications of service and documents, Tracking eService and errors	12 Minutes

File & Serve users can also register, free-of-charge, for live Web Conference Training Sessions by clicking on the “Web Conference Training Sessions” link, also in the TRAIN section of the File & Serve portal page. **NOTE: When registering for Web Conference Training, make sure you list the names of all the people from your group who will be attending to help ensure that the webinar will not be cancelled based on low registration numbers.** ■

Notice to eFilers: Rules Governing Filing and Service by Electronic Means

For an explanation of the rules governing Filing and Service by electronic means, please see the current Uniform Trial Court Rules, Chapter 21, as set out in Chief Justice Order:

[CJO 13-014 - Order of Out-of-Cycle Amendment of UTCR 21.040, 21.050, 21.070, 21.080, 21.090, and 21.120 \(effective 3/26/13\)](#)

and additional temporary limitations set out in Chief Justice Order:

[CJO 13-015 - Order Prohibiting Electronic Filing of Applications for Fee Waiver or Deferral Under UTCR 21.050\(2\)\(a\) and Proposed Orders and Judgments Under UTCR 21.080\(4\) \(effective 3/26/13\)](#)