

# Data Exchange/E-Filing Grant Meeting

## MINUTES

JANUARY 11 2007

9:00 A.M. - 4:00 P.M.

DANIELS FUND

<b>TYPE OF MEETING</b>	User Group Chartering Meeting
<b>FACILITATOR</b>	Dan Welch, Curtis Rose, & Chris Kain
<b>NOTE TAKER</b>	Chris
<b>ATTENDEES</b>	Dan Welch, Shirley Williams, Chris Kain, Traci Worthan, Van Head, Diana Coffey, Bob Roper, Alicia Davis, Donna Gibbs, Larry Desbian, Galina Krivoruk, Craig Goellner, Eileen Wiseman, Beverly Tait, Mary Burson, Greg Smith, Diane Degenhart, Marla Bohling, Laura Burgess, Cathi Walker, Danielle Stecco, Cindy Vigessa, Curtis Rose

### Agenda topics

#### CHARTERING MEETING PURPOSE

CURTIS

<b>DISCUSSION</b>	Curtis gave a brief introduction to the purpose and objectives of the chartering meeting and an overview of the process to be followed.		
<b>CONCLUSIONS</b>			
<b>ACTION ITEMS</b>	<b>PERSON RESPONSIBLE</b>	<b>DEADLINE</b>	
None			

#### SANCA/TRAILS DEMO

GREG SMITH & DIANA COFFEY

<b>DISCUSSION</b>	Diana & Greg gave a presentation (see attached for presentation slides) and led a discussion on the SANCA project (automated Eclipse – TRAILS interface). The purpose of this presentation was to give the group an understanding of what had been accomplished with SANCA and what might be possible if we used SANCA as the model for the e-filing project.		
<b>ACTION ITEMS</b>	<b>PERSON RESPONSIBLE</b>	<b>DEADLINE</b>	

#### CSE APA PROCESS OVERVIEW

CINDY VIGESAA

<b>DISCUSSION</b>	Cindy gave a presentation (see attached for presentation slides) and led a discussion on the APA process. This presentation provided the group with a common framework on the current process.		
<b>ACTION ITEMS</b>	<b>PERSON RESPONSIBLE</b>	<b>DEADLINE</b>	

#### POINTS OF PAIN

CHRIS

<b>DISCUSSION</b>	Chris led a discussion of points of pain within the current system and processes related to the APA process. Team members were asked to write down their ideas on points of pain, and then they were discussed with the group. The idea is that one of the purposes of this project would be to address some of these points of pain.  The following is the list the group created:
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	<p><u>Points of Pain</u></p> <ul style="list-style-type: none"> <li>➤ Delay of input in to the Court System (J)</li> <li>➤ Redundant Data Entry (J/CS)</li> <li>➤ Quick turnaround on orders signed by judge (CS) <ul style="list-style-type: none"> <li>▪ (related: ACSES auto generate documents)</li> </ul> </li> <li>➤ Need docket # ASAP for payment processing (CS)</li> <li>➤ Caseload at judicial (Staffing) (J)</li> <li>➤ Lack of all electronic documents with signature and notary (CS)</li> <li>➤ Currently must search numerous systems for case information, no centralized information screen (CS)</li> <li>➤ Incomplete (or poor quality) information (i.e. SSN, DOB) provided when case is submitted. (J)</li> <li>➤ No real-time notification of subsequent actions (J/CS)</li> <li>➤ Paper vs. Electronic Documents: Train judges on how to review and give easier resources to use (J)</li> <li>➤ Need to physically store cases (paper files) (J)</li> <li>➤ Variances in county and court practices across the state (J/CS)</li> <li>➤ Must have necessary information to provide to other states &amp; jurisdictions (orders) (J/CS)</li> <li>➤ Attorneys do not have access to information/system (CS)</li> <li>➤ No link between TRAILS and ACSES (J/CS)</li> </ul>	
<b>ACTION ITEMS</b>	<b>PERSON RESPONSIBLE</b>	<b>DEADLINE</b>

**MINIMUM & MAXIMUM SUCCESS**

CURTIS

<b>DISCUSSION</b>	<p>Curtis led a discussion framing the group’s vision for success for the e-filing project. This vision was categorized into minimum success (needs) and maximum success (wants) items. The points of pain previously developed were used to focus the group and make sure that items suggested for these success lists were addressing pain points previously identified.</p> <p>The following are the lists the group developed</p> <p><u>Minimum Success:</u></p> <ul style="list-style-type: none"> <li>➤ Eliminate manual input on APA at the court</li> <li>➤ Quick turnaround on the Docket #</li> <li>➤ Electronic Storage of Court Documents</li> <li>➤ Standardization of court case types (i.e. JV vs. DR)</li> <li>➤ Signed orders – Event returned quickly</li> <li>➤ Ability to produce orders for pro se parties and other jurisdictions</li> <li>➤ Centralized info screens (court and child support)</li> <li>➤ Process should save time for judicial officers and CS staff</li> <li>➤ Provide subsequent updates</li> </ul> <p><u>Maximum Success:</u></p> <ul style="list-style-type: none"> <li>➤ Provide subsequent updates</li> <li>➤ Paper on demand system</li> <li>➤ Parents generate orders off CSE website (also other states) (certified?)</li> <li>➤ Electronic notary</li> <li>➤ Enhanced centralized info screens</li> <li>➤ Make sure IV-D attorneys have access to the system</li> <li>➤ Electronic delivery of info to other jurisdictions</li> </ul>
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ACTION ITEMS	PERSON RESPONSIBLE	DEADLINE

**ABILITIES**

CHRIS KAIN

<b>DISCUSSION</b>	<p>Focusing on the minimum success list, Chris led a discussion to identify the abilities the project needed to provide in order to fulfill the vision for minimum success. This discussion also helped identify some assumptions and misunderstandings the group were operating with. Through the development of these ability statements, the group began to clarify the minimum success vision and identified high level requirements they desired the project satisfy.</p> <p><u>Abilities:</u></p> <ul style="list-style-type: none"> <li>➤ Ability for CS to initiate APA cases electronically with the court (to be provided for all jurisdictions and CS offices)</li> <li>➤ Ability for the court to electronically relay docket # to CS</li> <li>➤ Ability for the court to store <u>necessary</u> documents (review process of what is done now)</li> <li>➤ Ability to electronically exchange data as a result of subsequent case updates (both directions)</li> <li>➤ Ability to file necessary supporting documents electronically where courts and CSE have the capability and resources</li> <li>➤ Ability to standardize court case types on APA Actions</li> <li>➤ Ability to electronically notify CSE that an order has been signed, and electronically provide ACSES with information from the updated order</li> <li>➤ Ability to retrieve and print signed order</li> <li>➤ Ability to view summary information on a case (ACSES &amp; Eclipse)</li> </ul>	
<b>ACTION ITEMS</b>	<b>PERSON RESPONSIBLE</b>	<b>DEADLINE</b>

**ELEVATOR STATEMENT**

CURTIS & CHRIS

<b>DISCUSSION</b>	<p>Curtis led the discussion to develop an elevator statement this project. An elevator statement is a short statement that clearly defines a project’s purpose. This statement can be used to quickly (for example during an elevator ride) communicate a project’s vision to someone unfamiliar with the project. The elevator statement follows a specific format:</p> <p style="padding-left: 40px;">For (target customer)  Who (statement of the need or opportunity)  The (product name) is a (product category)  That (key benefit, compelling reason to buy)  Unlike (primary competitive alternative)  Our Product (statement of primary differentiation).</p> <p>e-filing Elevator Statement:  For families who depend on timely execution of APA child support orders the <u>To Be Named Project</u> is an electronic case filing and information exchange program allowing CSE and the courts to exchange data electronically, unlike the current paper dependent system, our product will expedite child support orders, reduce redundant data entry, and improve data accuracy.</p>	
<b>ACTION ITEMS</b>	<b>PERSON RESPONSIBLE</b>	<b>DEADLINE</b>

None		
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**PROJECT RISK & POTENTIAL ISSUES**

CURTIS & CHRIS

<b>DISCUSSION</b>	<p>Curtis &amp; Chris led a brief discussion on potential project risks and issues. The following is the preliminary list developed by the group.</p> <ul style="list-style-type: none"> <li>➤ Availability of resources (Technology and People)</li> <li>➤ Resistance to technology and process changes</li> <li>➤ Ability to provide a solution that works for, and is understood by, all jurisdictions/users</li> <li>➤ Scope Creep &amp; the ability to maintain project's focus</li> <li>➤ Technopain <ul style="list-style-type: none"> <li>▪ Overly technical solution</li> <li>▪ Overly dramatic</li> <li>▪ Too much, too fast</li> </ul> </li> <li>➤ Potential constraints due to current technical infrastructure</li> <li>➤ Communication: Continuous &amp; Clear</li> <li>➤ Lack of common process, culture, language, between Judicial and CSE</li> <li>➤ Different understanding, assumptions, expectations</li> <li>➤ Ability to compromise</li> <li>➤ Communication and relationship between the local CSE &amp; Judicial offices</li> <li>➤ Coordinating the schedules, availability, priority of user group members' and judicial &amp; CSE team members' time.</li> </ul>		
<b>CONCLUSIONS</b>			
<b>ACTION ITEMS</b>	<b>PERSON RESPONSIBLE</b>	<b>DEADLINE</b>	

**NEXT STEPS/ACTION PLAN**

GROUP

<b>DISCUSSION</b>	<p>The group decided it would meet monthly from 9 – 12 on the 2<sup>nd</sup> Thursday of the month.</p>		
<b>ACTION ITEMS</b>	<b>PERSON RESPONSIBLE</b>	<b>DEADLINE</b>	

<b>OTHER</b>	<p>Chris will send out copies of the minutes</p>
<b>NEXT MEETING</b>	<p>The next user group meeting is scheduled for 9 – 12 on Thursday 2/8. It will be held at the Jefferson County Social Services Building, 3500 Illinois Street, Laramie Building Suite 1300.</p>