

A Message from Patricia Gabel, Esq., State Court Administrator & Project Sponsor:

Dear Colleagues,

On June 5th, the Judicial Bureau commemorated the first anniversary of its transition to Odyssey. This milestone could only have been reached with the commitment of and collaboration among the JB's management, staff and judicial officers, the project team, RIS developers and Helpdesk staff, and the Finance division. As the vanguard of our implementation, the intrepid members of the JB navigated uncharted territory. Twelve months later, they are seasoned and savvy. The lessons learned helped us to chart the course for the first trial courts during the Phase II implementation in the Windsor, Orange, and Windham county units in March of this year.

The lessons learned from both Phases I and II continue to shape our plans for the Phase III implementation in Bennington, Rutland, Addison and Chittenden county units, as well as the Environmental Division in September. Phase III always necessitated a greater reliance on remote technology, but as we embarked on Phase III, we faced a starkly different reality. In light of guidance from national and state health officials, the in-person training and justice partner meetings upon which we relied in the previous phases are no longer advisable.

We are utilizing an array of remote learning tools to overcome these challenges and to stay the course. Employees in Phase III are learning Odyssey through online instruction including live, online training, interactive tutorials through Tyler's Learning Management System, recorded webinars, and docket specific classes. Additionally, project team members will reinforce online training through one-on-one training toward the end of the training period. Our justice partners and members of the public also have several opportunities for online training—some of which are outlined in this newsletter.

Despite the challenges of remote training during the COVID-19 crisis, I am confident that a successful Phase III implementation is achievable.

Even before the COVID-19 pandemic, this project was going to achieve a profound transformation in court operations by significantly increasing our ability to provide access to justice to diverse users of the court system more efficiently and effectively and our ability to manage our resources more flexibly. With the onset and continuation of the pandemic, the NG-CMS initiative has become an essential and time urgent project.

I appreciate the continued commitment of judicial officers, staff, and project team members to make the NG-CMS initiative a continued success.

Thank you, Pat

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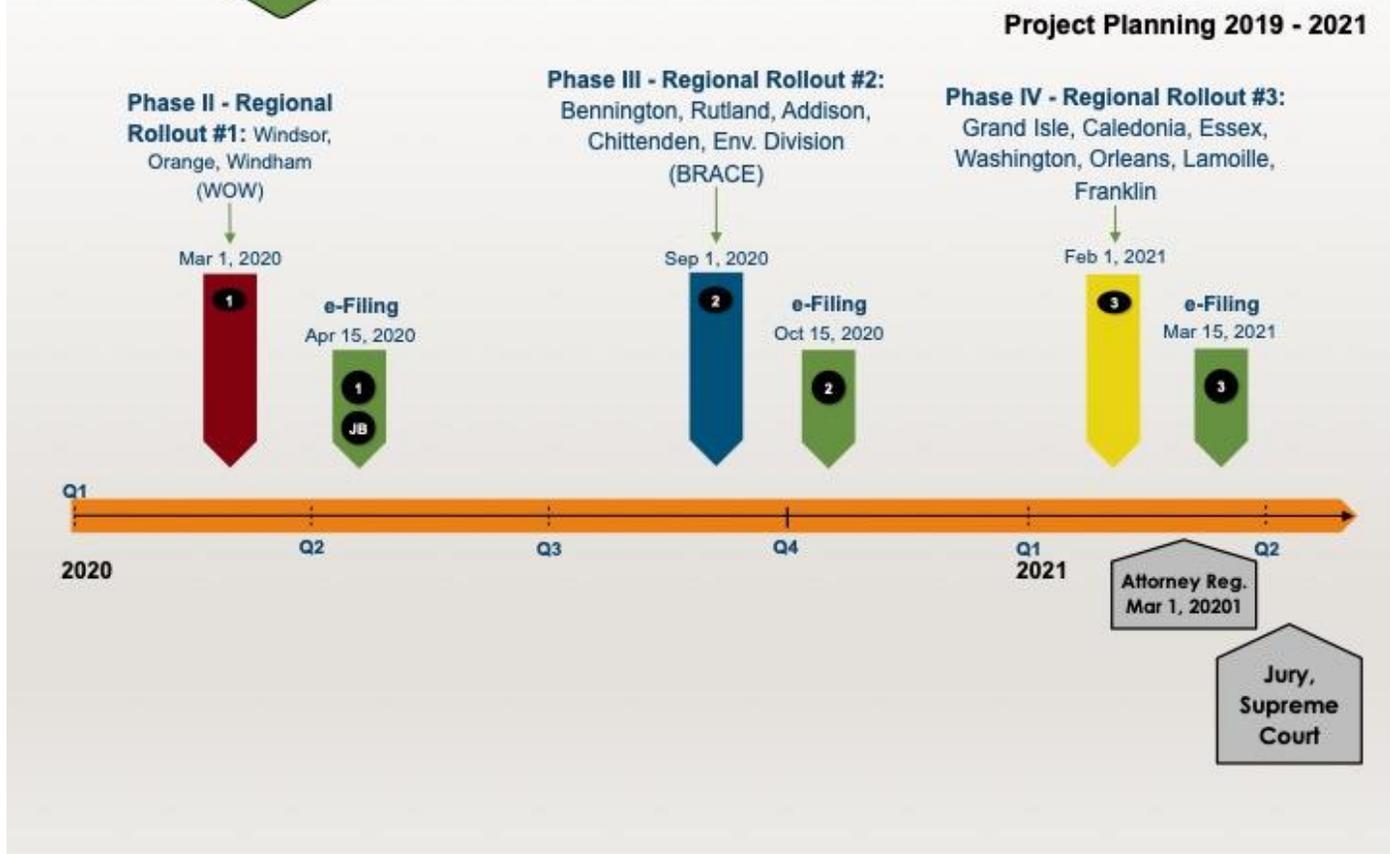
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NG-CMS Phase II-IV Timeline (Jul '20)



E-Filing Training Opportunities

On or about October 19th, the Chittenden, Bennington, Rutland and Addison Units and the Environmental Division will begin using Odyssey File & Serve (OFS) for e-filing. Court users in these regions and across the state can take advantage of the following training opportunities:

❖ **Register for an e-filing training webinar.**

Starting September 10th, Tyler Technologies will offer live webinars on how to electronically file documents using OFS. These sessions are offered for free and registration is open to all, including attorneys, self-represented litigants, and state agency employees. To register, click [here](#).

❖ **Practice setting up your firm and submitting filings.**

You are welcome to practice registering your firm and filing cases in the e-filing “stage” or “practice”

environment anytime. The stage environment is available through the following link: <https://vermont-stage.tylerhost.net/ofswb>. While they look similar, this “stage” website is not the same as the live e-filing website. Documents submitted through the “stage” website are not being filed with the court. The “stage” environment is not a substitute for registering and filing on the actual e-filing site.

❖ **Read Vermont specific e-filing guides.**

Our website includes several e-filing guides to help you with OFS. To view the most updated guides, click [here](#) and then click on Odyssey File and Serve User Guides.

Judicial Bureau Celebrates First Year of Odyssey

The Judicial Bureau officially transitioned to the new Odyssey case management system over a year ago on June 5, 2019. Despite being the very first court on Odyssey and the highest volume court in the state, the JB could not be slowed down! Its staff of eleven employees worked diligently with Judge Howard Kalfus, Assistant Judge James Colvin of the Bennington Unit, and Assistant Judge Joyce McKeeman of the Orange Unit to process an impressive 70,000+ cases in the new paperless system this past year. Recently, Judge Kalfus, Superior Court Clerk Joanne Charbonneau and Court Operations Manager Jenn Morse took some time out of their busy schedules at the JB to share some thoughts about the transition.

Can you describe some of the benefits of using Odyssey?

Judge Kalfus, Joanne and Jenn mentioned a few highlights:

- Being able to view documents electronically has been a real time saver. If someone calls the court to ask about their case, staff can immediately pull the case up on Odyssey and view the file.
- The Public Portal has been helpful in a few ways. First, it lets people look at their own cases any time to check the status and to see if there are any hearings pending. Second, payments made into the portal are instantly applied to their case. There's no delay and staff no longer have to manually enter the payments into the case management system.
- Odyssey offers so much easily accessible information for judicial officers. The judges are



Hon. Howard Kalfus, Kathy George(back), Noreen Morrie, Cheryl Tremblay (back), MaryAnn Jasinski, Joanne, Jayne King (back), Sarah Driscoll, Ellen Stone, Laura Snow, Jenn Morse, and Martin Sanborn. (Trish Pettengill not pictured)

finding that having every aspect of every case including financials and links to other cases to be very helpful.

Who has helped you personally in making the JB transition succeed?

Joanne and Judge Kalfus agreed that Jenn Morse and Jennifer Teske have personally made the transition a success for the Judicial Bureau staff and the Information Center staff while paving the way for the Trial Courts. All the highly dedicated employees of the Information Center also deserve a special thank you for resolving so many of the JB's calls this past year. Their support has been absolutely vital to the JB's success. Finally, Chasity Stoots-Fonberg has been a wonderful, responsive resource as we continue to streamline and improve our processes.

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(“Judicial Bureau” continued)

What advice would you give to the courts that are about to start using Odyssey?

Joanne: “Don’t be afraid to ask questions. With patience and perseverance, you will succeed.”

Judge Kalfus: “Understand that while certain things are and will continue to be slower (such as launching forms), Odyssey really does make up for it in many ways including other time-saving measures.”

Finally, how did you mark the occasion?

The JB held a celebratory luncheon, complete with cupcakes and gift bags!



Two New Video Demonstrations of Odyssey Programs Are Available

Odyssey Project Manager Andy Stone has recently recorded two video demonstrations to help attorneys, self-represented litigants, and others to better navigate the Odyssey system. They are posted on the Judiciary’s website, but you can access the videos directly from the links below.

Odyssey File & Serve

This demo provides an overview of registering in Odyssey File & Serve, how to initiate a new case, and how to file a subsequent pleading into an existing case.

<https://www.youtube.com/watch?v=ke2ouMDK4VQ&feature=youtu.be>

Public Portal

This demo provides an overview of registering in the Portal, how to look up cases, and how to request elevated access to view your case files.

https://www.youtube.com/watch?v=rD_Hkcatv60&feature=youtu.be

A Closer Look at Odyssey File & Serve and the Public Portal

The Odyssey software suite uses *three* distinct products to allow cases in the Vermont Superior Court system to live a completely digital life. Although non-

attorneys may submit paper filings if they wish, attorneys must (and others may) file electronically, enabling cases to be filed, managed, adjudicated and appealed without a single sheet of paper.



1. **Odyssey Navigator:** The main software application is Odyssey Navigator (aka the case management system or CMS for short) which is *used exclusively by judicial officers and court staff*. This is the main hub of the Odyssey suite, housing the actual data and documents.

2. **Odyssey File & Serve:** The electronic filing software is called Odyssey File and Serve (OFS), or simply e-filing. *This website is used by attorneys and others to transmit information and documents to the Odyssey CMS for the court staff to process.* <https://vermont.tylerhost.net/ofswb> Registration on this website is necessary to file electronically. There are many instructive resources found on opening page of this site; each should be read and perhaps considered as an addition to ‘favorites’ in your web browser. A few important points:

- A document or group of documents transmitted at the same time is called an “envelope”.
- There is a charge for each envelope filed.
- Court staff must review and ‘approve’ the contents of each envelope for inclusion into a court case. The filer will be notified by email when the envelope has been approved.

- The Efiling platform cannot be used to view court case data; it is simply the vehicle for transmitting data and documents to the court.

3. **Public Portal:** The Judiciary Public Portal <https://publicportal.courts.vt.gov/Portal/> is where court case details and documents can be *viewed by attorneys, case parties and others*. Just as access to paper court files has always been restricted according to Vermont Rules of Public Access, so access to the courts’ *digital* records is protected by these Rules, as well as Vermont statute (12 V.S.A. § 5)

Anyone using the Portal must first register. *Any* registered user can view Civil division and Judicial Bureau cases, which are deemed publicly accessible in the system. Permission to access the details of any other case type, however, are determined by the user’s “elevated access” level. After registering, users must request elevated access based on their role (attorney, case party, GAL, etc.) in court cases. Judiciary staff then use a unique identifying number to link the person’s elevated access to request to their record in Odyssey Navigator. This enables the user to view any case in which they are entered in the case record (as an attorney, a case party, a GAL, etc.). This type of access is called *individual* access and is based on connecting to the court cases in which the user is an actual party in the record.

Agency access differs from *individual* access, in that it relies on the user working for an employer who has a Memorandum of Understanding (MOU) with the Judiciary, affording access to specified case types as a whole. (i.e. all criminal, all criminal & juvenile, etc.) Those receiving agency access must 1) work for an agency having an MOU with the Judiciary, and 2) be named on the staff list submitted to the Judiciary by that agency.