

# Next Generation – Case Management System Update

*May 2021*



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

Dear Colleagues,

More than a year into the COVID-19 pandemic, it is clearer than ever before that the Next Generation Case Management System Project (also known as “NG-CMS,” and “Odyssey”) is more than a technological upgrade. This transformative initiative has been key to the Judiciary’s ability to operate safely and effectively during these unprecedented times. Through Odyssey, staff and judicial officers continue to work as a team even when they must work in separate spaces within the courthouse or even from home. Files are shared, documents are processed, and orders are issued



quickly, while complying with the COVID-19 protocols that have been adopted to ensure the health and safety of our staff and all court users.

Today, the Judicial Bureau, all trial courts, and the Environmental Division have successfully transitioned to using Odyssey. Indeed, it has been more than a year since the Orange, Windsor, and Windham units, which were part of the first trial court phase of the NG-CMS project, began using Odyssey. The Addison, Bennington, Chittenden, and Rutland units, along with the Environmental Division, have been on Odyssey for over seven months now. And the Caledonia, Essex, Franklin, Grand Isle, Lamoille, Orleans, and Washington units have been using Odyssey since February.

These are major achievements to celebrate even under ordinary circumstances. They are even more special in the context of a pandemic. While there were serious concerns when we pivoted to remote training, our personnel rose to the challenge and quickly became adept at using Odyssey Navigator and Odyssey File & Serve (OFS). This success is due both to the strength of the NG-CMS project team's teaching skills and to the dedication of our judicial officers, Superior Court Clerks, Court Operations Managers, and court staff to each other and the project. I have heard from all regions in the state that team spirit was essential to their success in learning Odyssey.

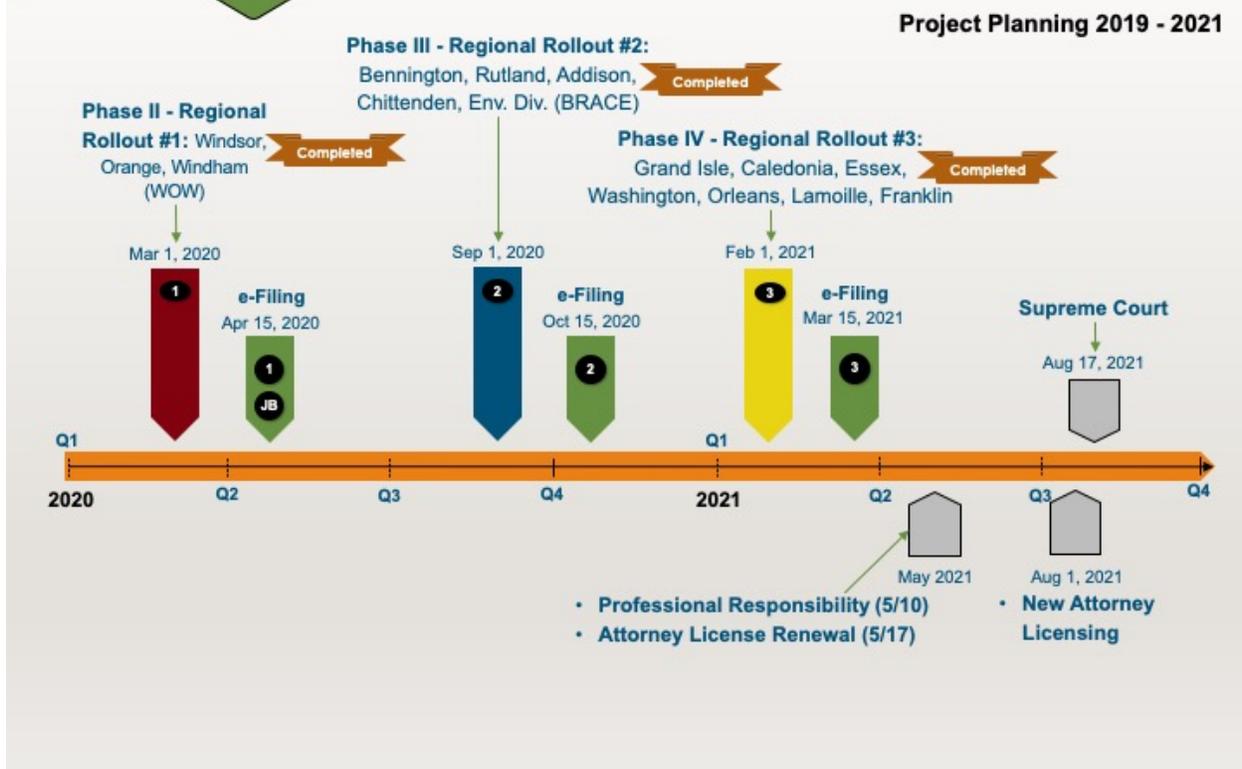
The bar has also risen to the challenge of learning to use Odyssey. The Judiciary and Tyler Technologies have offered several remote training sessions on OFS and the Public Portal this past year and many attorneys have availed themselves of these opportunities. And we continue to offer procedural help through the local court staff and our [JUD.EFileSupport@vermont.gov](mailto:JUD.EFileSupport@vermont.gov) email account. As of March 15<sup>th</sup>, efilings have been implemented statewide with great success. Over 10,000 envelopes a month are submitted via OFS for processing by court staff.

There are more major milestones in the NG-CMS project still to come. The Professional Responsibility Program, Attorney License Renewal, New Attorney Licensing, and the Supreme Court will transition to Odyssey by the fall. I hope you will read on to learn more about these phases. While there is much more work to do, the finish line is in sight. Thank you for your part in helping us get so far.

Sincerely,

Pat

# NG-CMS Phase II-IV Timeline (May '21)



## Supreme Court Update

The team of people engaged in the Supreme Court implementation of Odyssey and e-filing have been hard at work since June of 2020. Given the importance of the Supreme Court implementation, the team has been thoroughly reviewing processes and analyzing how those processes will translate into a paperless world. The team will complete initial configuration within the next month. The team has been working collaboratively with Supreme Court staff during the configuration process and will soon provide a demonstration to the Supreme Court Justices. More formalized training will commence in June. The intent is to provide training for both Judiciary staff as well as external stakeholders. Both Odyssey and e-filing will launch in the Supreme Court in August 2021.

## **Attorney Licensing Update**

Renewals for currently licensed attorneys will go live on May 17<sup>th</sup>. The go-live for newly licensed attorneys will be in September 2021. The rollout for Attorney Licensing includes a new Attorney Portal that attorneys will use to update their contact information. Please visit <https://www.vermontjudiciary.org/attorneys> to access the new registration guide for the new Attorney Portal. This guide contains an appendix called "Managing Login Credentials" which summarizes the different platforms where attorneys are now required to maintain registrations.

Each attorney will have their own "attorney case" that will be used for recording licensing events, such as Continuing Legal Education (CLE) requirements. The attorney case is a "lifecycle" case for a licensed attorney's time within the Vermont jurisdiction. Similar to how the e-filing system is used today, attorneys will use the e-filing system to initiate these kinds of licensing events. Attorney Licensing will also leverage the Guide & File product. This will be the first time Guide & File has been used in the Production environment.

## **Professional Responsibility Program Update**

The Professional Responsibility Program (PRP) team has been hard at work for the past several months thinking through the details of configuring Odyssey for PRP processes. The PRP implementation also includes the new Bar Assistance Program (BAP), led by Michael Kennedy, that launched on April 1st. By consensus, the team decided that Odyssey could be used immediately for the BAP. The BAP is now live in Production. The remaining work before the May go-live for the remaining functions of the PRP is centered on developing forms, testing the configuration, and completing data conversion.

## **Jury Management Update**

Since 2011, the Judiciary has been using Jury+ as its jury management software. In November 2020, the Judiciary completed a no-charge change request to move over from the original Tyler Jury product to Tyler Jury Management (TJM) after Tyler purchased Courthouse Solutions jury product. The TJM product is an off-the-shelf product with additional add-on features available. The Judiciary has opted to purchase additional features including Summons Direct, Tyler Jury SMS (text message add on), and Jury Capture. It is expected this project will be complete by September 2021.

## WOW Region Commemorates One Year Anniversary on Odyssey

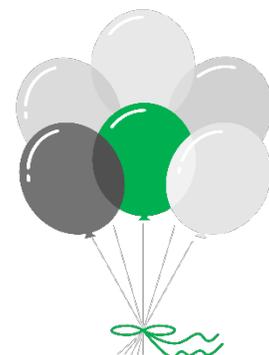
*The Orange, Windham, and Windsor units (aka "WOW") region was the first trial court region to begin using Odyssey on March 2, 2020. Then on April 15, 2020 they were the first courts to begin e-filing through Odyssey File & Serve. The learning curve was steep, but the individuals in the WOW trial courts and court users there were quick to learn the ropes together. The court staff and court users have also been eager to share their lessons learned with their peers across the state as they transitioned to Odyssey.*

*In recognition of her region's first year anniversary on Odyssey, **Superior Court Clerk Anne Damone** shared some thoughts on the benefits of Odyssey and what factors contributed to her region's successful transition:*

Odyssey has essentially opened up the doors to the rest of the Judiciary. I think of this as the culmination of efforts that began when the Judiciary became a unified court system in 2010. We used to run in a vacuum by counties. Unless you had special permission, you could not access other counties' records in the legacy case management system. But today, we can see cases from outside our county and that allows us to help other counties if they are short-staffed. Any judge can access any case and its documents. We no longer wait to receive the paper file in the mail when a case is transferred. Relating and attaching documents has allowed us to provide quicker access to the judges and, in some respects, the public as they can begin viewing their case documents in the Public Portal as soon as they are filed.

Staff members have told me how much easier it is to use Odyssey. It is not *always* quicker on certain tasks, but in many instances, it saves time when you have everything available at your fingertips and you are not flipping through paper, waiting for documents to arrive, and having to look in numerous places for the complete case file. And if nothing else we have saved *a lot* of trees!

I think that the Odyssey transition has been successful in large part due to teamwork in my region. We have been utilizing the Teams chat to help each other throughout this process and to some degree this has us working even closer together than ever before even though we are socially distancing. I think the major difference for us compared to the other regions is that my staff benefited from in-person training. Being able to bounce ideas off each other in our Team chat throughout the day has us working together in a very cohesive way. To anyone else learning to use Odyssey for the first time, I would say practice, practice, practice! Also, always check the manuals. If you still need help, check with your peers and your supervisor.



Our first anniversary celebration was not what we expected it would be like as we were all socially distanced. However, we made the best of things. We celebrated with pizza and cupcakes and beverages at our desks. And the Supreme Court, Pat Gabel, Judge Grearson, Tari Scott, and others joined us for a region wide Teams meeting to congratulate us on a job well done. We are looking forward to celebrating our *next* anniversary together!

## **Centralized Efiling Pilot**

### *A Note from Tari Scott, Chief of Trial Court Operations, and Joanne Charbonneau, Superior Court Clerk of Statewide Courts*

A pilot implementation of Centralized Clerk Review of Criminal efilings began on March 15<sup>th</sup> starting with intensive training on the Vermont Rules for Electronic Filing (VREF) and the Vermont Rules for Public Access to Court Records (VRPACR). There are six centralized clerk reviewers who have received this specialized training. A comprehensive training in reviewing and accepting or rejecting files through Odyssey File & Serve followed and after the two-week training, the six reviewers began working with actual filings in the Caledonia, Essex, Grand Isle, Franklin, Lamoille, Orleans, and Washington units (aka ICEWOLF).

During the first week, the clerk review team outperformed all expectations and was able to thoroughly and skillfully review, accept or reject the filings, communicate errors to attorneys for correction, and transfer the filed documents to the clerk task queues.

After thoughtful consideration, it was decided that the project roll out could be expanded to the other criminal court divisions. On April 5<sup>th</sup>, the centralized review criminal filings in the Orange, Windham, and Windsor units began. On April 12<sup>th</sup>, the Chittenden Unit was added to the centralized reviewer project. On April 12<sup>th</sup>, the Addison and Bennington units were added to the project. And finally, on April 19<sup>th</sup>, the Rutland unit was added. Currently, the pilot has fully rolled out to all Criminal Divisions.

We continue to support and monitor the centralized reviewers as they expand their knowledge and skills in this process.

Efilers should see no difference on their end of efilings. The goal is for the incoming efilings to be thoroughly reviewed, accepted, or rejected per VREF, and VRPACR, and then moved to the docket clerk's Odyssey queues for final processing.

As noted, this pilot is currently only addressing filings in the Criminal Division. The Trial Court Operations division will assess the pilot each step along the way before the roll out to any other divisions occurs. We do believe that having a centralized clerk review

process will bring standardization to this important step in the process and that it will allow for more timely acceptance and processing of filings.

Thank you,

Tari Scott  
Joanne Charbonneau

## New Public Access Terminals



*One of two PATs in the Brattleboro Court*

When our courthouses reopen to the general public after the conclusion of the judicial emergency, visitors will notice new public access computer terminal(s) in the lobbies. It is anticipated that every courthouse will have at least one public access terminal (PAT) and that many courts will have two or more.

Visitors will be able to use the PATs to view any publicly available case statewide and to print case files. Standard copy fees will be charged for printed documents. Though the PATs are designed to be used independently, court staff are prepared to assist users. And, as always, court staff remain available to answer questions, describe routine procedures, and provide copies to visitors.

## About Odyssey File & Serve and the Public Portal

If you are new to Odyssey, the information and links below are a good place to start learning about Odyssey File & Serve and the Public Portal.

### **Odyssey File & Serve**

Odyssey File & Serve (OFS) is the website through which users will electronically file documents with the court. Attorneys and state agencies are required to efile using OFS. Efiling is optional for self-represented litigants. For information about OFS (including FAQ and division specific user guides), please visit the judiciary's efilng page at <https://www.vermontjudiciary.org/about-vermont-judiciary/electronic-access/electronic-filing>

To visit the OFS website directly, please visit <https://vermont.tylerhost.net/ofswab>

### **Public Portal**

The Public Portal is the website through which users can view their case files either remotely or at a court's public access terminals. User can also pay criminal and Judicial Bureau fines using this website. For information about the Public Portal (include a user guide and video demonstration), please visit <https://www.vermontjudiciary.org/about-vermont-judiciary/public-portal>

To visit the Public Portal website directly, please visit <https://publicportal.courts.vt.gov/Portal>



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