



# E-Filing Automation Committee Meeting

# Installs and Schedule

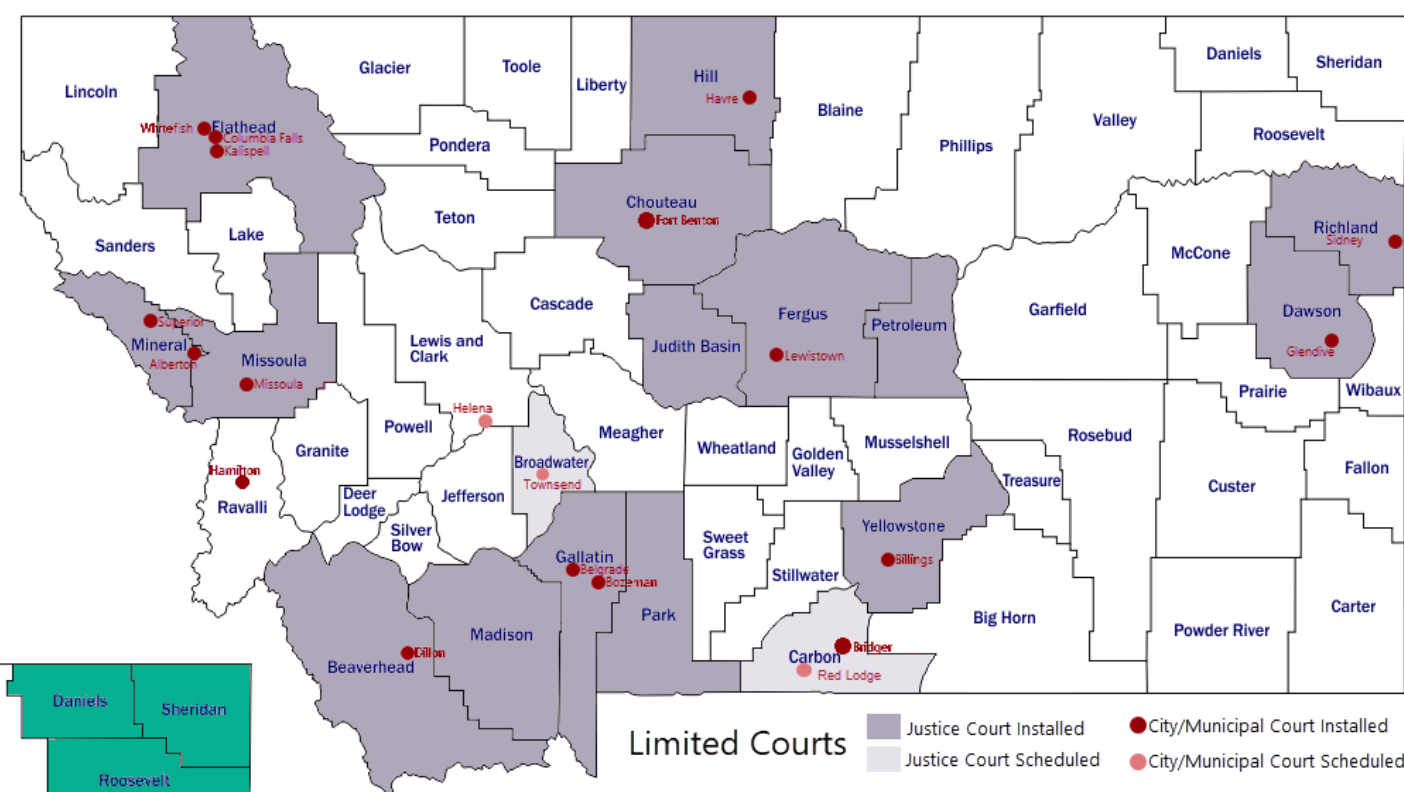
## Recently Installed

- ▶ Sanders County District Court – 1/23/24
- ▶ Petroleum County District Court – 2/27/24
- ▶ Chouteau County Justice Court – 3/26/24
- ▶ Fort Benton City Court – 3/26/24
- ▶ Madison County Justice Court – 3/26/24
- ▶ Beaverhead County Justice Court – 4/9/24
- ▶ Bridger City Court – 4/16/24
- ▶ Hamilton City Court – 4/16/24
- ▶ Park County Justice Courts – 5/14/24
- ▶ Petroleum County Justice Court – 5/14/24

## Future Installs

- ▶ Carbon County District Court – 6/4/24
- ▶ Helena Municipal Court – 6/18/24
- ▶ Red Lodge City Court – 6/18/24
- ▶ Carbon County Justice Court – 6/18/24
- ▶ Broadwater County District Court – 6/18/24
- ▶ Broadwater County Justice Court – 7/8/24
- ▶ Townsend City Court – 7/8/24
- ▶ Powell County District Court – 8/12/24
- ▶ Butte-Silver Bow County District Court – 8/12/24
- ▶ Deer Lodge County District Court – 9/9/24
- ▶ Granite County District Court – Pending
- ▶ Lincoln County District Court - Pending

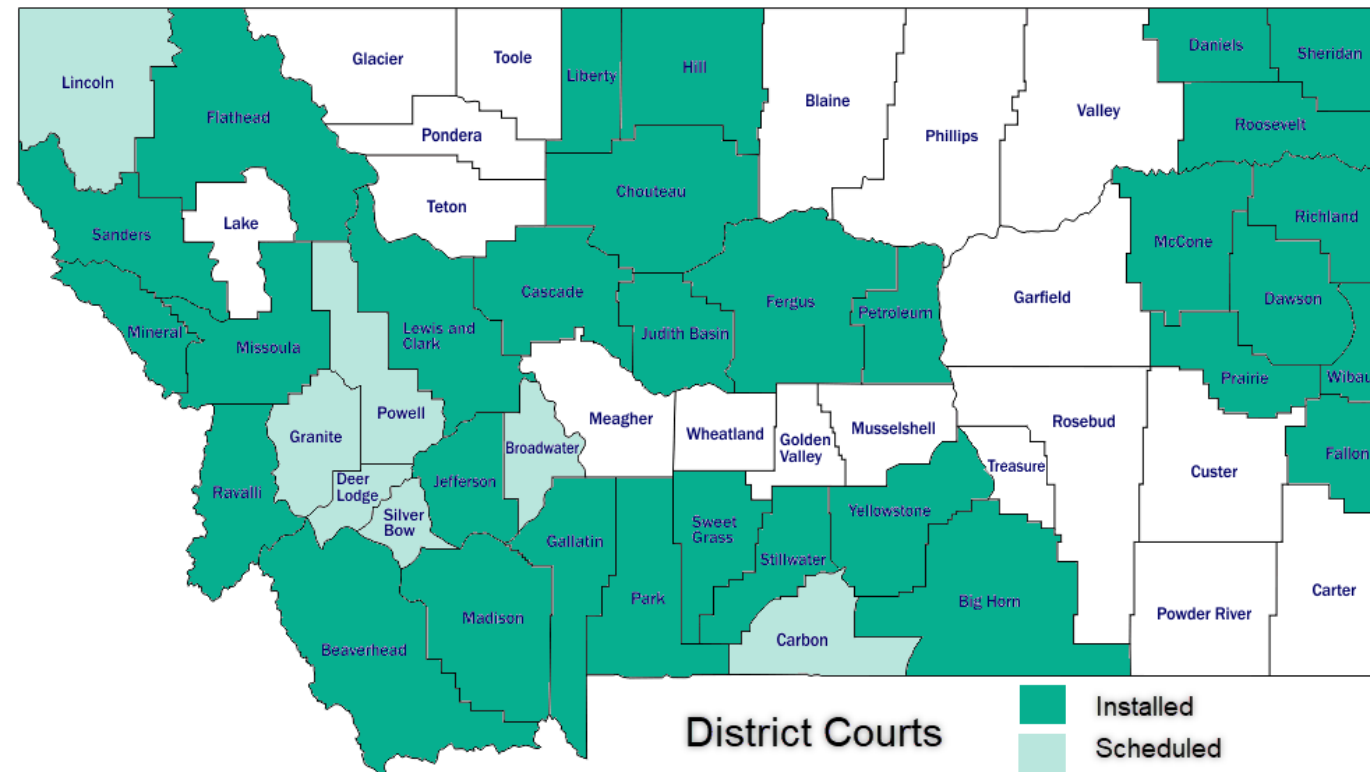
# Courts installed with E-Filing



## Limited Courts

## Other Courts:

- Montana Supreme Court
- Asbestos Claims District Court
- Montana Water Court



# Statistics

## Courts:

1 Supreme Court  
31 District Courts  
15 Justice Courts  
17 Municipal/City Courts  
Plus Water Court & Asbestos Court

## Active Registered E-Filers:

7 Supreme Court Justices  
1 Clerk of Supreme Court  
73 District Court Judges  
35 Limited Court Judges  
25 Clerks of District Court  
2,950 Govt Attorneys/Attorneys  
170 Court Reporters  
1,513 Case Participants  
2,833 Authorized Staff

7,611 total users (7,009 total active users on  
11/30/2023)

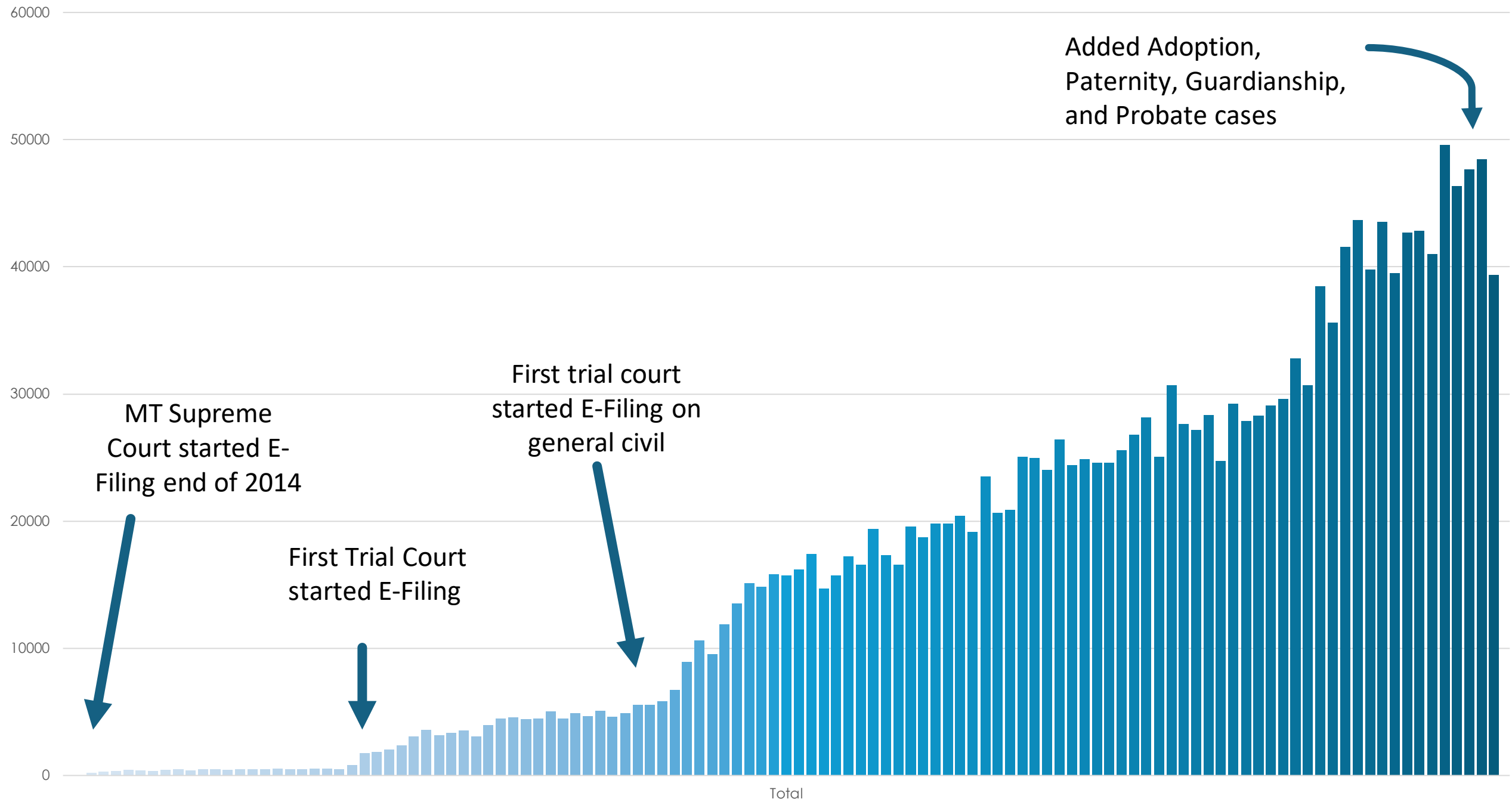
## # of Tickets from last 12 months:

2,726 tickets

All Time		Last 12 Months	
E-Filings	Cases	E-Filings	Cases
1,890,267	268,135	544,525	115,973

Stats recorded on 5/24/2024

Number of Filings by Month



# Software Version Updates

E-File Version Updates: Installed May 10<sup>th</sup>, 2024

- **V7.6.3** – attempted to improve E-Filing performance, created a problem entering case number and with the Judge Review Queue
- **V7.6.4** – Fixed a problem with the Justice Review Queue, fixed a problem entering the case number, attempted to fix the problem with the Judge Review Queue
- **V7.6.5** – Attempted to fix a problem with the Judge Review Queue
- **V7.6.6** – Fixed the problem with the Judge Review Queue

FCE Version Updates: Installed December 11<sup>th</sup>, 2023

- **V8.3** – No longer sends dismissed litigants to E-File, updated the Pending Electronic Filings queue filter to include “all” case type options, fixed a problem with unsealing documents while processing e-filings
- **V8.3 Patch 1** – Fixed a problem with the Address Line 2 field not importing
- **V8.3 Maintenance 1** – Fixed a problem with document sequence numbers trying to duplicate

# Other Updates

- ▶ Enabled Adoption, Guardianship, Paternity, and Probate case types at the District Courts
- ▶ Enabled Small Claims at the Limited Jurisdiction Courts
- ▶ Updated the statute table
- ▶ Removed the “Filed on Behalf of” field for certain subtypes
- ▶ Fixed a problem with the ESB that was caused by submitting a filing over 80 MB – crashing the system
- ▶ Potentially fixed a problem with the clerks being unable to process certain E-Filings
- ▶ Removed the extra ROA on new criminal cases at the District Courts



# Outstanding Problems

- ▶ State abbreviation is missing in address on COS
- ▶ ROA does not always accurately describe who the filer is when payment is present
- ▶ Unable to assign multiple prosecutors to DJ cases
- ▶ Judge review queue sometimes displays the wrong motion
- ▶ Occasional problem auto assigning a judge
- ▶ Occasional “User Not Authorized” error
- ▶ Received of field does not auto populate
- ▶ Adlib failures after maintenance weekends
- ▶ **Processing an E-Filing on a case removes the “Date of Death” from a deceased person**
- ▶ **Unable to switch E-File users’ roles – some users unable to register as a result**
- ▶ **E-Filing eServed the wrong documents**



# Software Vendors

## E-Filing – Thomson Reuters

- ❖ TR desires to retire Montana e-Filing
- ❖ Believed could make more money on additional filing fees passed to filers
- ❖ They cannot sustain maintenance relationship
- ❖ Maintenance commitment through 6/30/2027

## JSI/FSX E-Filing Partnership

- ❖ Currently working with TR customers
- ❖ Awaiting an FSX - FCE Integration Proposal
- ❖ Proposal to Governor's Office, then to 2025 Legislature
- ❖ Hoping for Sole Source Approval (no RFP)

## Trial Court CMS – Justice Systems Inc.

- ❖ JSI bought by Avenu Insights & Analytics (January 2024)
- ❖ Looking for robust CMS (FullCourt Enterprise)
- ❖ Interested in quick and substantial investment in JSI products and team
- ❖ 500 JSI customer contracts to transition
- ❖ Expecting positive changes in resources and CMS improvements

# Enhancement Requests

## Thomson Reuters\*

- ▶ Auto Plaintiff for SL and SW case types – In development
- ▶ \*Automatically fill in the first document filing type and subtype on the upload document page - Unapproved
- ▶ \*Make the filing type and subtype fields searchable - Unapproved
- ▶ \*Add a comment box on the attorney's filing summary page – Unapproved
- ▶ \*Save 'Other Service Recipients' – Not yet requested
- ▶ \*Judges to change queue sort order – Not yet requested

## FinVi/JSI

- ▶ Mapping filing types to ROA codes (e.g., Motion – Unopposed) – Delivered
- ▶ Make the 'Route to Judge' field a required field – Approved
- ▶ ROA shows if filing was routed to the judge – Waiting for SOW
- ▶ Search by 'other party' name – Waiting for SOW



DN Issues



Survey



Rules

# Subcommittees

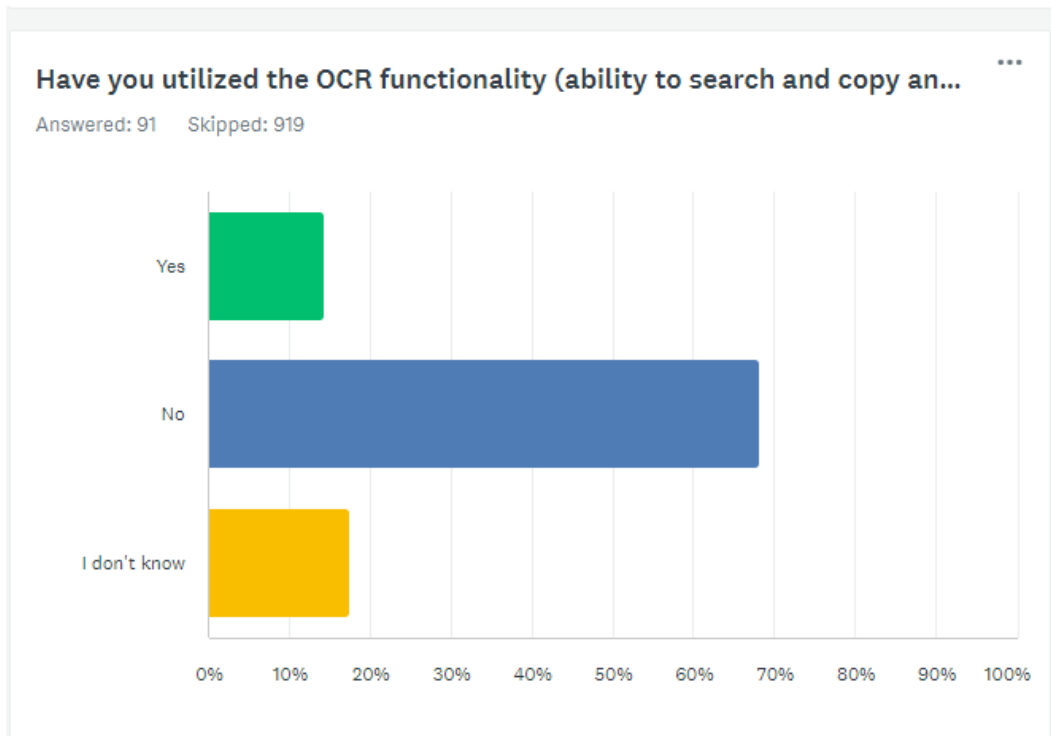


# Survey Results

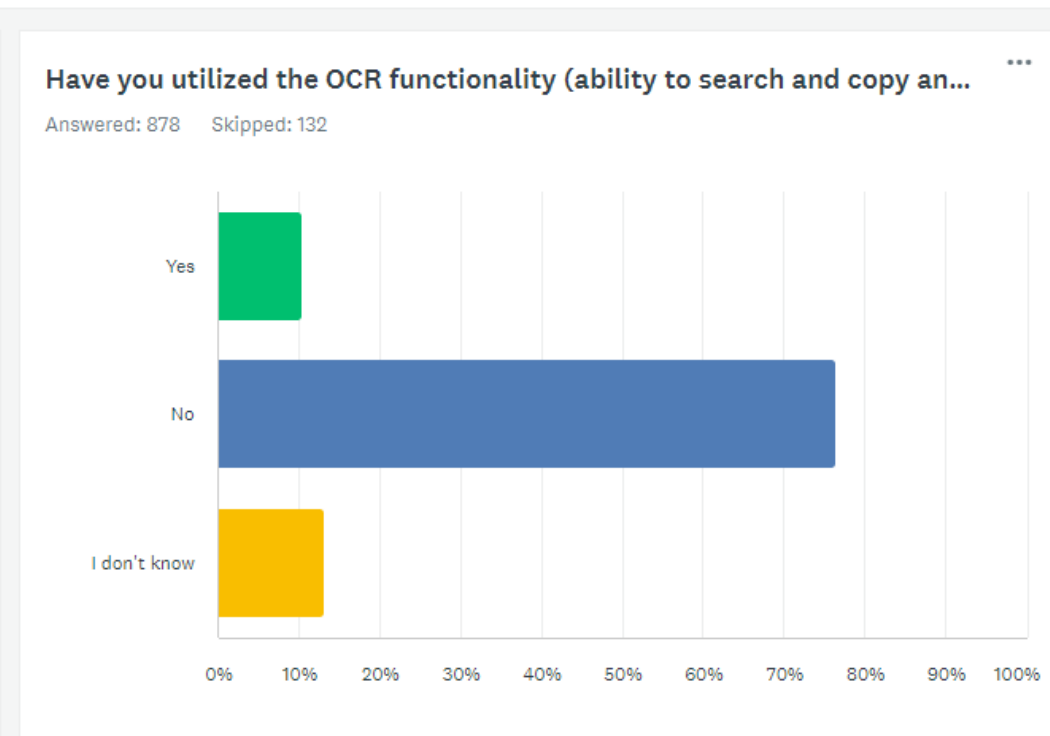
[HTTPS://WWW.SURVEYMONKEY.COM/STORIES/SM-NHIMYWZOGSOYXOW2D23PFG\\_3D\\_3D/](https://www.surveymonkey.com/stories/SM-NHIMYWZOGSOYXOW2D23PFG_3D_3D/)

## Discussion Topic

- ▶ How do we address courts who have reached the maximum threshold number of days that a filing is active before they process it?
- ▶ Should Optical Character Recognition (OCR) be removed from E-Filing/Adlib?



Judges and Staff



Attorneys and Staff

# Schedule Summer of 2025 Meeting

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LOOK FOR LINK TO THE MEETING POLL IN YOUR EMAIL