

# E-Filing Automation Committee Meeting

December 11, 2025, 1:00 PM – Held via Zoom

**Attendees:** Justice Jim Shea, Karen Kane, Judge Audrey Barger, Amy McGhee, Diane Anderson, Sean Goicoechea, Craig McKillop, Jeanine Blaner, Jackie Poole, Wendy Cash, Ryan Davies, Grace Rodriguez, Maggi Everett, and Holley DeWitt

**Not in attendance:** Judge Shane Vannatta, Miranda Johnson, Dave McAlpin, Matt Jennings, Brenda Snapp, Paige Allen Trautwein, Judge Jessica Fehr, Nick Aemisegger, Amy Tolzien

## Approval of Meeting Minutes from June 2025 Meeting

Approval tabled until next meeting or until quorum is reached later in session.

## Overview of Current System and Schedules

### Installations and Schedule

Courts that have installed E-Filing since the last committee meeting:

- Pondera County District Court – 6/26/2025
- Teton County District Court – 7/1/2025
- Golden Valley County District Court – 7/10/2025
- Wheatland County District Court – 7/10/2025
- Butte City Court – 7/15/2025
- Toole County District Court – 8/15/2025
- Rosebud County District Court – 9/9/2025
- Custer County Justice Court – 10/7/2025
- Custer County District Court – 12/8/2025

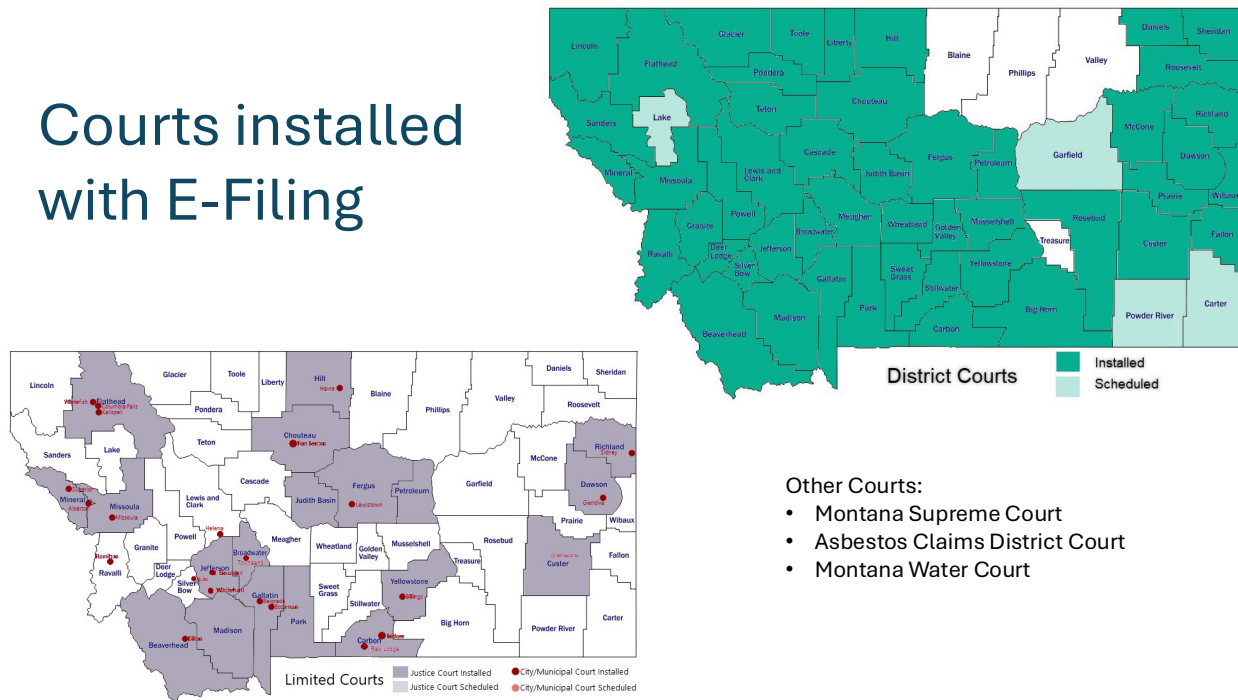
Courts scheduled for future installs of E-Filing:

- Miles City Court – 1/28/2026
- Lake County District Court – 2/17/2026
- Garfield County District Court – 3/10/2026
- Carter County District Court – 3/24/2026
- Powder River County District Court – 3/24/2026

**Status:** Only 4 district courts remain before statewide District Court rollout is complete.

Figure 1

## Courts installed with E-Filing



### Other Courts:

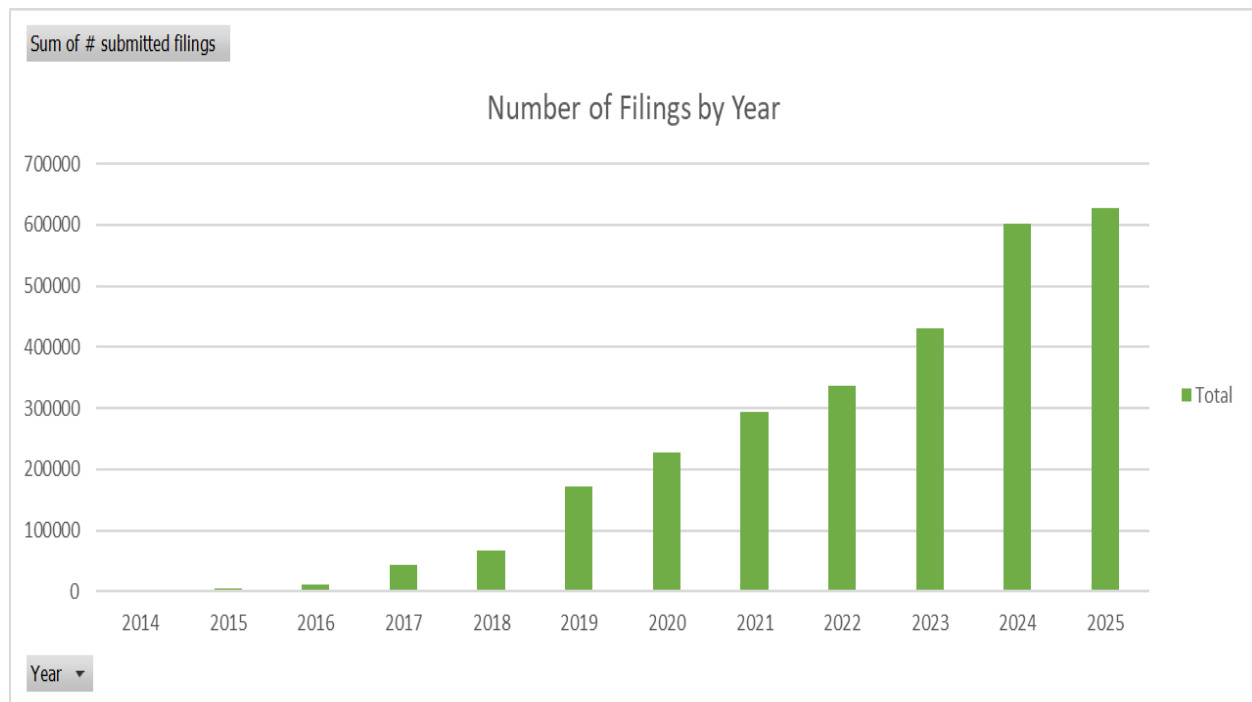
- Montana Supreme Court
- Asbestos Claims District Court
- Montana Water Court

### Statistics (Recorded on 12/1/2025)

The following statistics were shared with the committee.

- Courts using E-Filing:
  - 1 Supreme Court
  - 49 District Courts
  - 19 Justice Courts
  - 23 Municipal/City Courts
  - Plus, the Montana Water Court and the Montana Asbestos Court
- Active registered e-filers:
  - 7 Supreme Court Justices
  - 1 Clerk of Supreme Court
  - 81 District Court Judges
  - 42 Limited Court Judges
  - 25 Clerks of District Court
  - 3,201 Govt Attorneys/Attorneys
  - 200 Court Reporters
  - 2,184 Case Participants
  - 3,544 Authorized Staff
  - 9,285 total users (8,705 total users 6/2025)
- 3,113 support tickets opened in the last 12 months worked on by the E-Filing support team
- Number of E-Filing submissions:
  - Last 12 months – 686,038 e-filings on 156,943 cases
  - All time – 2,901,361 e-filings on 406,181 cases

Figure 2



## Updates, Fixes, and Changes

### E-File Version Updates

No E-Filing version updates.

### FCE Version Updates

No FCE version updates. Version 10.0 expected from the vendor January 2026.

### Other (non-software version) updates

Other E-Filing related updates made since the last committee meeting are listed below:

- Added Foreign Guardianship Case Subtype to FCE and E-Filing.
- Removed Temporary Investigative Authority DN filing subtypes (effective Oct 1, 2025).
- SSL Certificate update fixed issue with messages being accepted from FCE to E-Filing.
- Issue with some filings stuck in pending status. OCA is working with the vendor to fix the issue.
- Clerk/Judge E-Filing newsletter created to help with communication.

### Outstanding Problems

The following outstanding items were shown on screen but not discussed in detail, since they have been on this list previously.

- The ROA does not always accurately describe who the filer is when a payment is present.
- The judge review queue sometimes displays the wrong motion.
- E-Filing displays an occasional "User Not Authorized" error for users when they try to log in.

- Adlib fails to function properly after maintenance weekends, unless we restart the server manually.
- E-File staff is unable to switch E-File users' roles – some users are unable to register as a result.
  - This does not affect the end user daily, but it does affect the E-Filing staff members' ability to switch users' roles.
  - A role change usually takes about 2 minutes, but it currently takes about 2-4 days to change someone's role in E-Filing, because it now must be done through a database script.
- The e-file system eServed the wrong document in an eService notification.
  - There has been one report on this issue. The filer submitted multiple documents and marked one of the documents so that it would be excluded from eService but chose to eServe the other documents. E-Filing excluded a document that should have been served and served the one it should have excluded.
  - E-Filing is not serving the wrong documents on a large scale. Only this one known instance.
- Error message displayed when a clerk processes a filing is generic and does not describe the issue.
- The Pending Electronic Filings sort function is displaying some case types that it shouldn't be.
- A couple reports of Judge's receiving Ajax error in Judge Review Queue
- Errors opening eService notifications to Other Recipients

The following items are new open issues.

- Submitting a filing with a fee to the Supreme Court and a filing to the lower courts together causes an issue with the payment being sent to the correct court.
- Supreme Court Notice of Appeal titles not always generating correctly.
- Random messages getting stuck between FCE and E-Filing.
- Musselshell County District Court receiving an error processing new Criminal filing. (fix expected in FCE v10.0)

## Product Enhancement Requests

Previously tabled due to vendor and cost concerns.

- **Discussion:**
  - Ryan Davies emphasized caution due to technical debt and short remaining lifespan of current system (4–6 years).
  - Committee agreed to review requests individually at next meeting and prioritize “need-to-have” over “nice-to-have.”
- **Action:** Ryan & Holley will prepare recommendations for next meeting.

## Vendor Status Update

- Legislature appropriated **\$1.475M** for e-filing system remediation.
- Thomson Reuters initially considered dropping Montana as a customer; negotiated update instead of \$9M replacement.
- **Timeline:**

- Discovery phase through Q1 2026.
- Remediation work ~1 year after scope finalized.
- Current system lifespan: until ~2030–2031, then full replacement likely.

## Discussion Topics

Revisit topics from previous meeting

### File Stamp Overlap

- **Issue:** Supreme Court file stamp often overlaps district court file stamp on uploaded documents, making both illegible.
  - **Cause:** Automated placement of stamps in the same location.
  - **Discussion:**
    - Fix would require a change request to Thomson Reuters to adjust automated stamp placement.
    - Justice Shea noted this is likely a low-priority enhancement given cost and complexity.
  - **Next Step:** Justice Shea will follow up with Supreme Court Clerk's Office to confirm severity before deciding if a formal request is warranted.
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### Draft Policy on Support Limits

- **Background:** Committee previously discussed drafting a policy to define the scope of technical support provided by OCA for e-filing issues.
- **Status:** Ryan Davies acknowledged no progress yet; will revisit at next meeting.
- **Purpose:** Clarify boundaries between OCA support and court responsibilities.

New topic discussions

### Committee Membership

- **Vacancies:** Matt Jennings (now Missoula County Attorney) and Judge Venetta resigned; Miranda Johnson moved to Bozeman Municipal Court and requested to remain on committee.
  - **Plan:**
    - Solicit nominations for replacements by **January 15, 2026** (email Holley).
    - Confirm Miranda's continued participation after Judge Barger contacts Bozeman judges.
      - January 2, 2026, confirmed Miranda will continue serving on committee
  - **Voting:** Will finalize new members via email before next meeting.
    - **Note:** An email vote was not sent out so we will vote at the next meeting
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### Attorney Multiple Accounts

- **Request:** Attorney asked for two separate e-filing accounts (one for OPD work, one for private practice).
- **System Limitation:** Current system links accounts to bar numbers; cannot support multiple non-government attorney roles per bar number.

- **Committee Decision:** Denied; considered unnecessary and technically burdensome.
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#### E-Filing Queue Limit

- **Current Setting:** Filings remain active for 120 days before auto-clearing.
  - **Concern:** One judge expressed concern that this was not enough time, requested extension beyond 120 days.
  - **Discussion:**
    - Judge Barger and Justice Shea opposed extension; noted 120 days is already generous (motions deemed denied after 60 days by rule).
    - Suggested judges use reminders in case management system if needed.
  - **Outcome:** Limit remains at 120 days. If MJA consensus later suggests change, we can revisit; encourage local reminders/workflows via FCE.
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#### Emergency Filing Button

- **Function:** Allows filers to mark submissions as “emergency,” pushing them to top of clerk’s queue.
  - **Problem:** Overuse by some filers, including non-urgent filings (e.g., PSI reports).
  - **Discussion:**
    - Clerks find it annoying but manageable; prefer handling locally rather than rule changes.
    - Training emphasizes proper use (only for filings needing review within 24 hours).
  - **Decision:** No rule change; clerks may address misuse individually.
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#### Error Notification Text

- **Current Issue:** When filings error, system message instructs filers to “contact the court,” which clerks cannot resolve.
  - **Proposal:** Change wording to direct filers to OCA tech support.
  - **Action:** Holley will check feasibility with Thomson Reuters; report back next meeting.
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#### Document Auto-Scaling

- **Problem:** Documents scanned at non-standard sizes (e.g., legal size) cause file stamp and judge signature misalignment.
  - **Solution:** Enable system rule to auto-scale all documents to letter size (8.5x11).
  - **Discussion:**
    - Easy to implement internally; no vendor cost.
    - Minor risk: Shrinks legitimate legal-size documents (e.g., wills), but committee agreed impact is minimal.
  - **Action:** OCA will implement and monitor for complaints.
    - **Note:** This was implemented on April 17, 2026
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## Rules Discussion

- Consider making **temporary e-filing rules permanent**.
- Janine Blainer explained process: petition Supreme Court, public comment, adoption.
- Flexibility remains similar; enforcement unchanged.
- **Plan:** Discuss and vote at next meeting.

## Subcommittee Updates

- **DN Subcommittee:** Karen Kane gave an update
  - Issues: CASA service, putative fathers, terminated parents, document naming, search functionality.
  - Next meeting: Feb 9, 2026; Holley invited.
  - May need district judge participation.
- **Rules Subcommittee:** No new amendments; membership review needed.
- **Survey Subcommittee:** Next survey planned for 2026.

Holley will send out a poll to schedule the next meeting for Summer 2026.

The meeting was adjourned at 2:57pm.

## Action Items for Committee Members

| Action Item                                                                                                            | Owner                       | Due                         |
|------------------------------------------------------------------------------------------------------------------------|-----------------------------|-----------------------------|
| Solicit nominations to replace Matt Jennings & Judge Venata; email to Holley; compile & circulate; conduct email vote. | Holley DeWitt               | <b>Jan 15, 2026</b>         |
| Confirm Miranda Johnson may remain on committee (Bozeman Municipal Court).                                             | Judge Audrey Barger         | <b>Jan 15, 2026</b>         |
| Prepare recommendations on which enhancement requests (if any) should proceed (need-to-have only).                     | Holley DeWitt & Ryan Davies | <b>Next meeting</b>         |
| Explore error email wording change ("contact the court" → tech support) with TR.                                       | Holley DeWitt               | <b>Next meeting</b>         |
| Enable auto-scaling of PDFs to letter size (8.5×11); monitor feedback; revert if significant issues                    | Holley DeWitt & OCA team    | <b>Immediately; monitor</b> |

## Abbreviations that may be used in this document:

- Adlib – the embedded document processing engine for all documents flowing through the e-filing system
- API – application programming interface, facilitating data exchanges between separate applications
- CMS – Case Management System
- COLJ – Courts of Limited Jurisdiction
- COS – Certificate of Service
- DLI – State of Montana Department of Labor and Industry
- DN – Abuse and Neglect, a case type at the district court level
- DOR – State of Montana Department of Revenue
- ECF – Electronic Courts Filing Standards
- ESB – Electronic Service Bus – a server used to broker data
- FCE – FullCourt Enterprise, the newest version of the court case management system in use by all courts of limited and general jurisdiction
- FSX – File & ServeXpress – an e-filing vendor
- IT – Information Technology; may refer specifically to the Montana Judicial Branch Information Technology division
- JSI – Justice Systems, Inc. – the FCE/V5 software vendor
- OCA – Montana Supreme Court Office of the Court Administrator
- OCR – Optical Character Recognition
- Okta – the current identity management software and database used for e-filing access
- OPD – State of Montana Office of Public Defender
- RFP – Request for Proposal
- ROA – Register of Action – docket entry
- SL – Statutory Lien(s), a case type at the district court level
- SITSD – State of Montana Information Technology Services Division
- SOW – Statement of Work
- TEF – Temporary Electronic Filing Rules
- TR – Thomson Reuters, the e-filing system software vendor
- V5 – FullCourt, the legacy court case management system, now being replaced by FCE