

E-Filing Automation Committee Meeting

June 6, 2025, 9:00 AM – Held via Zoom

Attendees: Justice Jim Shea, Karen Kane, Judge Audrey Barger, Judge Jessica Fehr, Amy McGhee, Paige Allen Trautwein, Diane Anderson, Brenda Snapp, Nick Aemisegger, Craig McKillop, Amy Tolzien, Ryan Davies, Grace Rodriguez, Maggi Everett, and Holley DeWitt

Not in attendance: Judge Shane Vannatta, Miranda Johnson, Sean Goicoechea, Dave McAlpin

Approval of Meeting Notes from December 2024 Meeting

Judge Fehr motioned and Karen seconded to approve the December 11, 2024 meeting minutes. The motion carried.

Overview of Current System and Schedules

Installations and Schedule

Courts which installed E-Filing since the last committee meeting on December 11, 2024:

- Meagher County District Court – 3/18/2025
- Musselshell County District Court – 4/15/2025
- Glacier County Justice Court – 5/20/2025
- Boulder City Court – 12/13/2024
- Whitehall City Court – 12/13/2024

Courts scheduled for future installs of E-Filing:

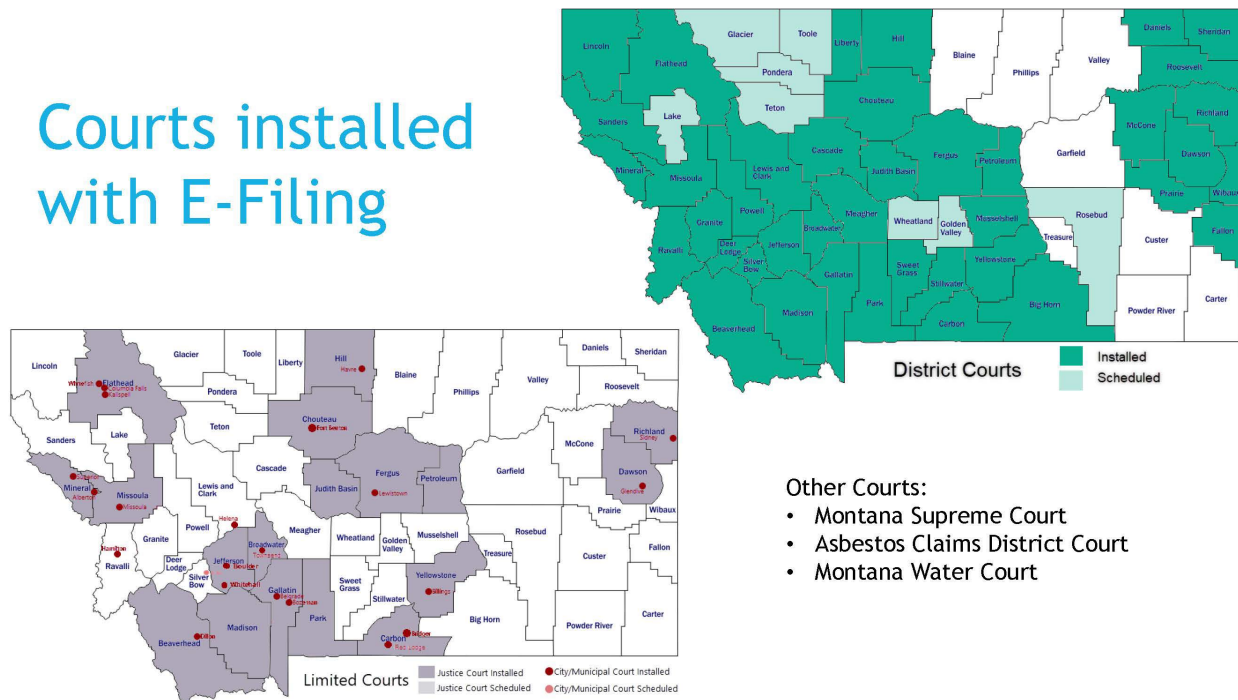
- Pondera County District Court – 6/26/25
- Teton County District Court – 6/26/25
- Golden Valley District Court – 7/10/25
- Wheatland County District Court – 7/10/25
- Butte City Court – 7/15/25
- Toole County District Court – 8/5/25
- Rosebud County District Court – 9/9/25
- Lake County District Court – 9/23/25

OCA's goal is to enable E-Filing at all the district courts by early 2026.

Justice Shea asked about the Workers Compensation Court. Ryan discussed that the Judicial Branch was not funded for the migration of the WCC into our technical environment. Currently, the OCA is working on getting them into FCE and that's the priority right now. In the future we can look at getting them on E-Filing.

Figure 1

Courts installed with E-Filing



Other Courts:

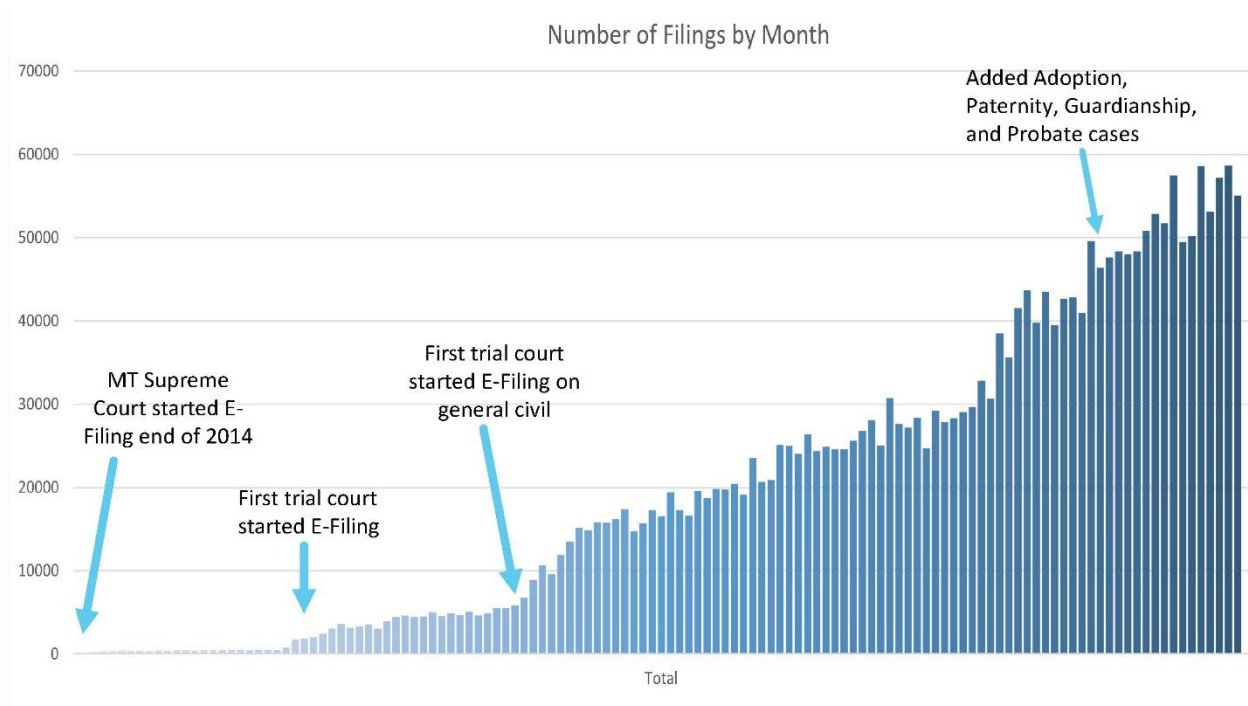
- Montana Supreme Court
- Asbestos Claims District Court
- Montana Water Court

Statistics (Recorded on 6/2/2025)

The following statistics were shared with the committee.

- Courts using E-Filing:
 - 1 Supreme Court
 - 41 District Courts
 - 18 Justice Courts
 - 22 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
 - 82 District Court Judges
 - 40 Limited Court Judges
 - 25 Clerks of District Court
 - 3,111 Govt Attorneys/Attorneys
 - 187 Court Reporters
 - 1,938 Case Participants
 - 3,314 Authorized Staff
 - 8,705 total users (8,207 total users 12/2024)
- 3,102 support tickets opened in the last 12 months worked on by the E-Filing support team
- Number of E-Filing submissions:
 - Last 12 months – 653,686 e-filings on 146,079 cases
 - All time – 2,553,023 e-filings on 359,138 cases

Figure 2



Updates, Fixes, and Changes

E-File Version Updates

No E-Filing version updates are expected soon.

FCE Version Updates

Version 9.1, 9.2, 9.2 maintenance 1, and 9.3 were installed. The following changes were included in the update:

- Made the Route to Judge field in the clerk review a required field.
- Fixed issue with duplicating prosecutors on DC and DJ cases.
- Corrected issue with date of death being removed from party details.

Next major version update will be 10.0.

Other (non-software version) updates

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

- Enabling the new criminal filing types we had the vendor map, including Motion-Unopposed.
- Added Indictment to the District Court criminal case subtypes.
- Removed the Notice of Appeal fee on criminal cases at the Supreme Court.
- Implemented a permanent fix to resolve the issue with PDF documents created in Google Docs.

Recent E-Filing slowdowns and errors traced back to network related issues. The OCA is working with SITSD and brainstorming ideas to improve these issues. One long-term idea is to move the database in-house, so the Judicial Branch is in control of the environment.

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.
- There is an occasional problem where FCE does not auto assign a judge.
- 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.

The following items are new open issues.

- A few Judges have received AJAX errors when working in the Judge Review Queue.
- Some attorneys who were eServed as an “other recipient” on the case have received errors when trying to open the documents.

Product Enhancement Requests

All enhancement requests have been tabled until our E-Filing vendor plans have been solidified.

Vendor Status Update

House Bill 10 allocated \$1.475M for the necessary upgrade to our current E-Filing system. That was reduced by \$25,000 from what the OCA asked for in the bill. The OCA will have to fund the remaining amount.

Ryan advised the committee to try to avoid any unnecessary enhancements and customizations in the future.

Discussion Topics

Revisit topic from previous meeting

- Certificate of Service does not display the email address when service method is email
 - Issue: Email addresses are not shown for conventional recipients on the E-Filing generated Certificate of Service.
 - Consensus: Not a current problem; no change needed at this time. Attorneys are encouraged to include their own COS to list the email addresses they served to conventional recipients.

New topic discussions

- Supreme Court file stamp placement over District Court file stamp
 - Issue: File stamp from District and Supreme Courts overlap which causes difficulty with reading the information on the stamp. It happens mostly with exhibits and orders filed at the District Court.
 - Action: Revisit at next meeting. Justice Shea will follow up with Lorrie and the law clerks to find out what type of problem this is creating and how if it can be addressed at the Court
- Requests for proof of eService
 - Issue: Is it appropriate for the OCA to provide attorneys with proof that eService was sent when requested.
 - Consensus: No privacy issue; okay to provide information to. Monitor volume to avoid overwhelming support team
- Level of Support
 - Issue: Repeated help requests for troubleshooting that we've determined are not system related but personal tech issues.
 - Committee agreed: Judicial Branch IT is not responsible for personal hardware/software troubleshooting.
 - Action: Draft written policy to define support limits
- Request for the Court Reporter role to have case search capabilities
 - Request: A request was made for the court reporter role to have case search access. When this user is working on out of district cases they would like to be able to view the cases in E-Filing to prepare for hearings.
 - Issue: The court reporter role does not currently have case search access. They can e-file only.
 - Committee consensus: No system-wide case access.
 - Preferred: The Court Reporter should request documents from clerk's office. If case access is needed beyond that, request FCE access from the District Court Clerk.

Subcommittee Updates

DN Issues Subcommittee

- Replace members on committee
 - Peg Allison retired; Paige Trautwein agreed to replace Peg
 - Nick Aemisegger to be replaced by OPD DN attorney (TBD)

Note: an email vote was sent out to replace Nick Aemisegger with Emily Lamson. The vote passed.

- Karen made a motion to amend the filing subtype list to remove Temporary Investigative Authority subtypes since it was removed from Title 41, HB 77. Amy Tolzien seconded. Motion Passed: Remove 3 petition subtypes referencing TIA (effective Oct 1, 2025)

Note: The filing subtypes referencing Temporary Investigative Authority have been removed as of October 1, 2025.

Survey Subcommittee

Nothing to report

Rules Subcommittee

Nothing to report.

- Proposal to consider making temporary rules permanent. Add to next meeting for discussion. Holley will send an invitation to Jeanine Blaner to attend the next meeting.

Holley will send out a poll to schedule the next meeting for early December 2025.

The meeting was adjourned at 11:32am

Action Items for Committee Members

Action Item	Owner	Due
Draft support policy to define support limits	Ryan	
Follow up on file stamp overlap with SC	Justice Shea	Next meeting
Add Paige to DN Subcommittee	Committee	Done
Identify OPD DN rep for committee	Nick/Karen	Done (Emily Lamson)
Schedule next meeting (early Dec) and add Jeanine Blaner to next meeting invite	Holley	ASAP

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