

**Minutes**  
**Court Personnel Committee Meeting**  
**February 23, 2021; 12:00 p.m.**  
**Zoom: See Calendar Invitation or Email for Login Info**

Members Present: Jill Acklin, Terri Berry, Hon. David Bonfiglio, Mary DePrez, Heather Falks, Kyle Gillaspie, Catherine Haines, Brandi Kirkendall, Hon. Chad Kukelhan, Hon. Stephenie Lemay-Luken, Chris Nancarrow, Hon. Nathan Nikirk, Hon. David Riggins (chair), and Kathy Williams.

Guests: Michael Moore and Ruth Johnson

Staff Present: Vicki Davis, Heather Falks, Kristyn Hill, Ashley Moise, Paige Newland, and Ruth Reichard.

1. December Minutes Approval: Jill Acklin motioned to approve the December Minutes. Chris Nancarrow seconded. The Committee voted unanimously to approve the December minutes.
2. Technology Update
  - a. Mary DePrez reported that there are seven counties remaining for Odyssey deployment. The Office of Court Technology's (OCT) goal is to finish up by the end of 2021. Noble and LaGrange Counties are coming up next. The latest deployment, Marion County Juvenile Court, was particularly challenging as it was the first conversion from Quest to Odyssey. Part of the conversion included a new detention center module.
  - b. The R17 update is tentatively due for the third or fourth quarter of 2021, contingent upon some upcoming fixes from Tyler Technologies.
  - c. OCT has also received a DOJ grant to develop a new jail management system in partnership with the Indiana Sheriff's Association and IPAC. Currently, there are at least 19 different jail management systems across the state.
  - d. OCT is also finalizing a scheduling application in INCite so that courts can more easily schedule hearings with various Department of Correction facilities. Courts can also be notified of lockdown situations at DOC facilities.
  - e. OCT also continues to improve party access to court documents through MyCase. A pilot will launch in a few months wherein parties can request access to their cases and receive a code either through the mail or by visiting the Clerk's office to access the casefiles. The pilot is a result of the Remote Access Task Force.
3. Digital Evidence for Appeals
  - a. Michael Moore and Ruth Johnson from the Indiana Public Defender Council noted that they are interested in offering some basic training for court staff on best practices for sending documents to the Appellate Division. Examples include how to transfer files, convert images/documents into PDFs, file compression, etc., the difference between public and private attorneys as it

pertains to receiving records, best practices related to communicating with appellate counsel especially in light of the recent rule on Notices of Appeal. Currently there are no standard practices and some court staff are more comfortable than others in preparing documents for appeal.

- b. In conjunction with a live training, a tip sheet would also be helpful and could be posted on INcite.
- c. The Committee supports a training of this type for court and clerk staff. The Committee discussed coupling this topic with another refresher on Transcript preparation led by Kyle Gillaspie.
- d. The Education team will regroup to propose some workable dates after the legislative session concludes.

#### 4. Discussion of 2021 Education Plans

- a. Virtual Seminars (April, July, October, December): Kristyn Hill reviewed the current plans for court and clerk staff education in 2021 starting with four live virtual seminars.
  - i. Each seminar is scheduled as a half-day program comprised of multiple complementary topics. They will be broadcast as Zoom webinars and recorded for later on-demand viewing in the Indiana Courts Education Network.
  - ii. Tentative topics are as follows: the first seminar will likely focus on court security; the second on legal/ethical issues including recent legislation; the third on court reporter hard skills (which could be a good place to include the aforementioned transcripts and technology tips training); and the fourth on “when the unexpected happens.”
- b. On-Demand Content (Catalog, Planned Courses): Kristyn Hill also reported that eleven on-demand courses had been released for court and clerk staff on the Indiana Courts Education Network and at least four more were planned for release shortly, including Legal Information vs. Legal Advice, Procedural Fairness, New Employee Orientation, and Transcripts.
- c. The Committee discussed the possibility of adding some shorter learning options that can be quickly consumed, such as microlearning courses, podcasts, etc. A few considerations for this are maintaining security of course content as well as how work time reporting factors in. Heather Falks reminded the Committee that if staff needs to be quarantined in the future and needs additional work to do at home, on-demand training can be assigned.
- d. Addendum: Ruth Reichard gave a verbal report on the recent Ethics and the First Amendment live webinar for court staff. Heather Falks served as faculty. In addition to court and clerk staff and judicial officers, community supervision and other specialty court personnel registered for this program. The maximum capacity of 500 was met, demonstrating strong interest in this topic across the judiciary.

5. Survey of On-Demand Court & Clerk Staff Courses: Committee members were recently surveyed on what courses they would like to see added for court staff education, particularly for new employees. Suggestions included: COVID-related

court operations, grants, introductions to IOCS/OJA staff, employer issues, internal investigations, directives and initiatives from the Supreme Court, and the progression of a casefile, as well as a few other miscellaneous topic requests from court staff around the state. Staff are also coordinating with JLAP to produce five short wellness sessions that will also be deployed soon. The Committee is encouraged to continue submitting additional topic ideas to the Education staff as they come about.

6. Institute for Court Management: Ruth Reichard reported that the second ICM course, Accountability and Court Performance, has been completed. This course addressed measuring not only public satisfaction but also internal processes to maximize efficiency. The next three courses will be Case Flow Management (May), Project Management (October), Budget and Fiscal Management, and Workforce Management (both in 2022). Those who complete all six courses will be eligible to become Certified Court Managers.
7. Future Meeting Dates
  - a. May 11, 2021, 12pm
  - b. August 17, 2021, 12pm
  - c. November 9, 2021, 12pm (location TBD)
8. Jill Acklin motioned to adjourn; Judge Lemay-Luken seconded. The Committee voted to adjourn at approximately 12:50pm.

Respectfully submitted,

Paige Newland

**Minutes**  
**Court Personnel Committee Meeting**  
**May 11, 2021; 12:00 p.m.**  
**Zoom: See Calendar Invitation or Email for Login Info**

1. February Minutes Approval: Judge LeMay-Luken motioned to approve the December Minutes. Jill Acklin seconded. The Committee voted unanimously to approve the February minutes.
  
2. Technology Update:
  - a. Mary DePrez reported that only four counties remain for Odyssey deployment. Jefferson County is scheduled for May, Warrick is scheduled for July, and Switzerland and Randolph Counties are scheduled for December. This should result in all trial courts using Odyssey by the end of 2021. The first deployment was in 2007 with Monroe County.
    - a. The Office of Court Technology (OCT) also added a new feature on public.courts.in.gov. Participating trial courts can make their calendars available on the same site that hosts the livestreamed hearings. It is voluntary and 150 courts are participating. Interested courts can contact OCT to get their calendars added.
    - b. OCT has also been working on a way to grant party access to secure documents on MyCase. Previously, only public documents were available to view and only the attorney of record could access confidential documents. In Phase One of this new system, party access for a public case such as criminal cases.
    - c. The Rule Committee is looking at a change to legal publication which would allow publication on the court's website in addition to or in lieu of a newspapers.
    - d. Red Flag Laws have been a hot topic due to the Fed Ex tragedy. There is discussion with Records Access regarding whether the cases should be treated the same especially in terms of coding of party versus participant. Committee discussed the possible need for Red Flags training for Court and Clerk Employees.
  
3. Education Update
  - a. April 21 Court Security Half-Day Seminar
    - i. Feedback has been very positive. We had a mixture of disciplines attend. Courses will be available on the Network for re-watch hopefully later this week.
    - ii. Committee discussed whether Law Enforcement assigned to court security full time or mostly full time should be allowed to have accounts on the Indiana Courts Education Network. The committee is in favor of allowing court security to have access to the Indiana Courts Education Network. The committee recommends have court security renew access to the Indiana Courts Education Network on an annual basis.
  - b. On-demand content released
    - i. Since beginning of 2021, we have released Sovereign Citizens Overview, Procedural Fairness, recording of First Amendment for Court Staff, Legal Information vs. Legal Advice, Five Wellness Nuggets, Transcripts, the New Employee Orientation bundle, and Threat Lens: Assessing Judicial Assassins (another court security course) on the Indiana Courts Education Network.

- c. Upcoming live and on-demand content: future live half-day programs – Committee members we asked to volunteer to open/moderate any of these programs.
    - i. **July 21:** We plan to incorporate some recent legislation/recent rules that court/clerk staff might particularly need to know for administrative purposes. Depending on time, we might also include sessions based on a couple of recent requests: ADA Overview for court staff and an overview of BMV forms/codes/etc.). Committee was asked what legislation topics/categories are of most value to court/clerk staff? Responses varied from everything needs to be covered, more information is better than none, and evictions need to be highlighted.
    - ii. **October 6:** Tentatively the plan is to cover transcripts overview with Kyle Gillaspie, FAQs with Beth Fullen from the office of Court Technology, and tips/best practices for converting & transferring files to appellate counsel with Michael Moore/Ruth Johnson.
    - iii. **December 8:** “When the Unexpected Happens, court staff edition.” This will tentatively be modeled after a couple of recent judicial programs exploring “what-if” scenarios you might encounter in the court office.
  - ci. Future On-demand programs
    - i. Kristyn Hill reported Guardianship Basics with Judge Vorhees and the recording of the Best Practices for Guardianship Abuses webinar from April 30 will soon be released on the Indiana Courts Education Network.
    - ii. Kristyn Hill reported that wish-list topics include jury administration/management, plain language, and protection order intake process for clerks.
4. Institute for Court Management 2021 courses
- a. Ruth Reichard reported that participants are in the process of the Case Flow Management course this week. Project Management is in October. The final two programs will be in 2022 and after that the participants will be Certified Court Managers. Currently, there are 29 participants from Indiana.
5. Future Meeting Dates
- a. August 17, 2021
  - b. November 9, 2021

Meeting adjourned.

Respectfully submitted,

Paige Newland

**Minutes**  
**Court Personnel Committee Meeting**  
**August 17, 2021; 12:00 p.m.**

Members Present: Mary DePrez, Lori Fleeman, Hon. Paul Freed, Kyle Gillaspie, Catherine Haines, Hon. Chad Kukelhan, Chris Nancarrow, Hon. Nathan Nikirk, Lisa Plencner, Hon. David Riggins (chair), Shelley Septer, and Kathy Williams.

Staff Present: Vicki Davis, Heather Falks, Kristyn Hill, Ashley Moise, and Ruth Reichard.

1. May Minutes Approval: Lori Fleeman moved to approve the May Minutes. Judge Kukelhan seconded. The Committee voted unanimously to approve the May minutes.
2. Technology Update
  - a. Mary DePrez reported that that Warrick County has been the county most recently converted to Odyssey, leaving Randolph and Switzerland as the only remaining trial courts needing to switch to the Odyssey case management system. Mary expects this will occur in December, on two different weekends, thus causing two separate episodes of downtime during the deployment. There are currently nine (9) counties still using Quest for their juvenile cases.
  - b. The deployment of the R17 update to Odyssey is scheduled for October; Mary described the various training opportunities that Court Technology will offer in connection with the upgrade to R17.
3. Education Update
  - a. Kristyn Hill reviewed the half-day, live remote seminar on July 21 and referred committee members to the evaluations in their packet. The program went well and attendees found the recent rules update especially helpful.
  - b. Kristyn then described the upcoming live, remote program on October 6, which will provide training on hard court reporting skills, including transcript preparation, FAQs, and appeals.
  - c. IOCS will offer another live, remote program on December 8 for court staff, which will feature hypothetical scenarios that court staff frequently encounter, titled “When the Unexpected Happens.” Kristyn asked committee members for their ideas and specific examples of situations that have arisen that can implicate ethics, the ADA, DEI, confidentiality, and more. She mentioned that will assemble a panel to serve as faculty and asked the committee members for ideas for faculty. Lori Fleeman volunteered to assist with the court reporter training, and Lisa Plencner volunteered to assist with the December training. Judge Riggins suggested that people registering for the December program could be asked for their own examples, as well. Kristyn Hill and Ruth Reichard described some of the hypotheticals involving court staff that were used in recent judicial training: sleeping jurors, animals in the courthouse, people wearing hats vs. hijabs in the courtroom, members of the public filming the security line, etc., in order to give the committee members some examples. Basically, the hypotheticals pose problems that require good judgement and a knowledge of the law (and the court’s policies) on the part of the court staff.
  - d. Finally, Kristyn Hill reviewed the status of the on-demand content available to court personnel in the Indiana Courts Education Network: currently, 36 courses are available for viewing on the ICEN, which is an accomplishment considering that before the pandemic,

there were very few if any courses for court staff. For the next meeting, Kristyn will provide metrics from ICEN summarizing how many people have viewed these programs.

4. Communicating Education Programs to Court and Clerk Staff:
  - a. Kristyn Hill reviewed how IOCS currently gets the word out about upcoming training for court personnel; some court staff had noted that they had not known about the July 21 program despite these efforts. Ideas for publicizing the events included: notices on INcite; notices on Odyssey, and notices from the Clerks' Association.
5. Court Reporter Training:
  - a. Heather Falks shared that in many medium and smaller counties, the court reporters are also acting as court administrators and office managers and making decisions on personnel issues such as leave time, benefits, etc.—however, they usually do not receive formal training in these areas. It was also noted that court reporters are seriously underpaid in proportion to the responsibilities that courts ask them to assume and, unlike probation officers, are not subject to a statewide wage scale. Court staff in general are county employees, not state employees. Heather has offered to provide training in employment law subjects and asked for the committee members' ideas for when and how to deliver this training. She is willing to record content for the LMS so that it can be accessed on-demand.
6. Institute for Court Management 2021-2022 courses:
  - a. Ruth Reichard reported that the Project Management for Courts course is set for October 19-20 and 26-27 later this year, from 9:00 AM to 1:00 PM each day. The final two courses are set for 2022: first, Budget & Fiscal Management on Feb. 3-4 and 10-11, from 12:00 to 4:00 PM; second, Workforce Management on Oct. 18-19 and 25-26, also from 12:00 to 4:00 PM. All of the courses will occur via remote learning; Ruth noted that the pandemic forced ICM to shift to remote learning for these courses, which in turn rendered them much more cost-effective. This enabled IOCS to pay for attendees' tuition for all six courses, instead of needing to subsidize attendees' hotel, travel, and food plus tuition.
7. Next Meeting:
  - a. November 9, 2021, 12pm
8. Meeting adjourned at 12:41pm.

Respectfully submitted,

Ruth Reichard

**Minutes**  
**Court Personnel Committee Meeting**  
**December 8, 2020; 12:00 p.m.**  
**Remote Meeting**

Members Present: Terri Berry, Hon. David Bonfiglio, Mary DePrez, Heather Falks, Kyle Gillaspie, Brandi Kirkendall, Hon. Chad Kukelhan, Hon. Stephenie Lemay-Luken (guest chair), and Chris Nancarrow

Staff Present: Vicki Davis, Heather Falks, Kristyn Hill, Ashley Moise, Paige Newland, and Ruth Reichard.

1. August Minutes Approval: Judge Lemay-Luken, guest-chair, motioned to approve the August minutes, Terri Berry seconded. The Committee unanimously voted to approve the December minutes.
2. Technology Update:
  - a. Mary DePrez reported that Brown and Martin Counties just went live with Odyssey. Training remotely rather than in-person has been somewhat difficult for both Court Technology staff and county staff. However, everyone has been able to adjust so far. This leaves only seven counties remaining to switch over to Odyssey as well as a few city and town courts.
  - b. Court Technology is also tentatively planning for a new release of Odyssey (R-17) in the third or fourth quarter of 2021.
  - c. Court Technology will also be converting Marion County Juvenile Court from Quest to Odyssey soon. Quest is very different from other case management systems in Indiana, so this will be a new and challenging experience.
  - d. Mary DePrez also demonstrated the newly released Trial Court Calendars feature on the Court's public access website. This is an opt-in feature for courts. It displays court calendars and associated live-streamed hearings. Courts can also link this page on their own websites.
  - e. Finally, Court Technology has also been supporting the Landlord-Tenant Settlement Conference Program which has so far had over 100 interested parties reach out. This program was ready to go when the moratorium on evictions was scheduled to end, but the moratorium was extended. Approximately 40 facilitators have been trained to date. There have already been some success stories so far, which is encouraging. Because the moratorium was extended, the number of participants in the program is not quite at the level expected, but it is good that the program is in place for when the moratorium eventually ends.
3. Education Update
  - a. Indiana Courts Education Network Accounts: Kristyn Hill reported that there have been 179 unique requests for court and clerk staff Network accounts. Some ideas for increasing the number of accounts included requesting a judicial officer to compose

an article for the Indiana Court Times encouraging other judicial officers to obtain Network accounts for their staff, and/or posting an informational announcement to INcite that staff could more easily view themselves.

- b. Monthly Court & Clerk Staff Distance Education Courses: Kristyn Hill reported that eight courses have been deployed so far since July with additional courses planned for the coming months including Race & Equity, Protection Order E-Filing, Sovereign Citizens, New Employee Orientation, Transcripts, and possibly Procedural Fairness. Of all available courses, there have been 176 full or partial completions. It was noted that many court staff are very busy at the moment and may have some additional time at the end of the year to catch up on some on-demand education.
  - c. Revision of New Employee Orientation & Transcription Training Modules: These are nearly ready to go and are planned for deployment in the next couple of months.
  - d. Institute for Court Management: Ruth Reichard reported that the first course, the Purposes and Responsibilities of Courts, occurred on November 12-13 and 17-18 and consisted of 15 hours of virtual classroom time plus some light homework. The majority of attendees were from Indiana. Others were from Arizona, Minnesota, Pennsylvania, Virginia, and Washington.
  - e. Focus Groups for Court Personnel: Kristyn Hill reported that she and Paige Newland met with Washington Circuit Court staff yesterday. Two additional focus groups are scheduled before the end of the year with Johnson Superior 4 and Clark Circuit 4. This brings the total in 2020 to nine focus groups.
  - f. New Employee Orientation Curriculum: Kristyn Hill reported that research is still being done to see what other states are doing. The goal is to add to existing content for newer employees. Suggestions from the Committee included distinguishing county and court employees and other miscellaneous HR-related topics; implicit bias; and trauma-informed care (both from a perspective of helping staff cope and giving them strategies to deal with members of the public). The Committee is encouraged to submit any other ideas for court and clerk staff education to Kristyn or Paige as they arise.
4. Future Meeting Dates
    - a. Feb 23, 2021
    - b. May 11, 2021
    - c. August 17, 2021
    - d. November 9, 2021
  5. Judge Bonfiglio motioned to adjourn; Terri Berry seconded. The meeting adjourned at approximately 2:00pm.

Respectfully submitted,

Paige Newland