

# Trial Court and Clerk Employee Conference

Indianapolis Marriott East, July 9, 2019

## AGENDA

**Internet Access: Select SSID: IOCS19 // Password: courts19**

### **8:00 a.m. | Registration**

*Outside Liberty Hall*

### **9:00 a.m. | Welcome: 2019 Trial Court and Clerk Employee Conference**

*Liberty Hall*

#### **Remarks**

Hon. Loretta H. Rush, Chief Justice, Indiana Supreme Court

#### **Civilian Response to Active Shooter Events (CRASE)**

You will not want to miss the opportunity to hear from two officers from the Indianapolis Metropolitan Police Department (“IMPD”) who will be here with their outstanding “Civilian Response to Active Shooter Events” (CRASE) presentation. The stark reality is active shooter events occur and no community is immune, but you can be prepared and the CRASE presentation will teach you how. *Faculty: Officers Timothy Blackwell and Madeline Green, Indianapolis Metropolitan Police Department (IMPD).*

*(A fifteen-minute break will be announced around 10:30 a.m. Break service will be in the Atrium.)*

### **10:45 a.m. | Morning Concurrent Courses**

*Courses will run until 12:15 p.m. (90 minutes)*

#### **A First Look at Odyssey Navigator and E-Filed Protection Orders—Up-to-the-Minute Tech**

*Salons 1-4*

Trial Court Technology staff will provide an overview of Odyssey Navigator, the new release of Odyssey that is coming toward the end of 2019. Odyssey Navigator has a new look and feel and many improvements which should result in a better user experience. And, you won’t want to miss e-filing FAQs, updates, and important information regarding e-filing protection orders and steps to ensure that those filings get your immediate attention in a paperless court. Finally, we will also have additional information, including venue and access to a driving record within Odyssey. *Faculty: Janelle D. O’Malley, Implementation Specialist, and Gaye Lynne Strickland, Director of Odyssey Implementation, Trial Court Technology, Indiana Supreme Court.*

#### **Court Reporters—Transcripts, Appellate Rules, and More**

*Salons 5-8*

This session will be focused on transcript preparation. We will talk about transcript formatting, exhibits, and confidentiality. We will also discuss common transcription issues like inaudible speech and sidebars. Additionally, we will consider some proposed changes to the Appellate Rules that will affect court reporters. *Faculty: Kyle Gillaspie, Chief Staff Attorney, Court of Appeals of Indiana.*

#### **Guardianship Registry—Tool for Trial Courts, Stakeholders, and the State**

*Veterans Hall 1-2*

The Guardianship Registry serves as a valuable tool to aid trial courts in fulfilling their obligation to oversee and manage guardianship cases, aids stakeholders interacting with guardians in easily verifying the status of the guardianship and provides the state with better information on guardianship cases to develop best practices in guardianships. This session will highlight the ways your work within the registry is vital to assisting the courts with properly supervising these cases. We will also review key factors related to e-filing impacting

proper case processing, registry system reports and alerts, and other best practice reminders. *Faculty to include: LaJuan D. Epperson, IT Project Manager, Trial Court Technology, Indiana Supreme Court; and Hon. Peter R. Foley, Morgan Superior Court 1.*

## Ethics for Court Staff—Legal Information versus Legal Advice

*Veterans 3-4*

How many times have you been talking with a self-represented litigant and found yourself struggling to determine just what you can safely and properly say? This is because giving a certain amount of legal information is permitted but dispensing legal advice is not. How do you avoid crossing the line from legal information into the dangerous territory of legal advice? Where is that line? It is a challenge every clerk or court staff member must confront-often on a daily basis! This session will help you navigate the challenges you face during your interactions with the public and stay consistently on the right side of the legal information and legal advice divide. *Faculty: Hon. Timothy P. Spahr, Miami Circuit Court.*

## 12:15-1:15 p.m. | Lunch

*Liberty Hall*

## Notice of Appeal—Changes to Service for Trial Court Staff

*Faculty: Robert Rath, Director, and Katie Wilson, Deputy Director, Applications, Office of Appellate Court Technology, Indiana Supreme Court.*

## 1:15 p.m. | Afternoon Concurrent Courses

*Courses will run until 2:30 p.m. (75 minutes)*

## A First Look at Odyssey Navigator and E-Filed Protection Orders—Up-to-the-Minute Tech (Repeat)

*Salons 1-4*

*Faculty: Janelle D. O'Malley, Implementation Specialist, and Gaye Lynne Strickland, Director of Odyssey Implementation, Trial Court Technology, Indiana Supreme Court.*

## Wellness and Mindfulness—Mental and Physical Health

*Veterans Hall 1-2*

This experiential session will focus on the benefits of mindfulness for mental and physical well-being. In addition, several mindfulness practices will be explored and practiced. A mindfulness practice can help improve personal and professional relationships and helps increase productivity and job satisfaction. Participants will leave energized—yet relaxed; focused—yet at ease; full of purpose—yet content to be in the moment. Move towards increased well-being today! *Faculty: Dr. Mary Yoke, PhD., FACS, M.A., M.M., Indiana University.*

## Protection Order Update—E-Filing and Recent Changes

*Salons 5-8*

Protection order practice will undergo many changes in 2019. The most exciting of these changes is the launch of e-filing for protection orders. Additionally, there were legislative changes that will affect protection order practice beginning July 1. This presentation will highlight the changes to protection orders that will be coming to your county this year as well as provide a legal overview of protection order practice for new and seasoned clerks and trial court personnel. *Faculty: LaJuan D. Epperson, IT Project Manager, Trial Court Technology, Indiana Supreme Court; Lisa D. Manning, Family Violence Resource Attorney, Indiana Office of Court Services, Indiana Supreme Court.*

## People Suck! How to Deal with Difficult People

*Veterans 3-4*

This presentation, “People Suck! How to Deal with Difficult People,” will focus on providing customer service within the judiciary. Specifically, this presentation will assist court and clerk’s office personnel in dealing with difficult people. At the end of this presentation, participants will leave with tactical skills they can put to immediate use within their current job roles. Specific takeaways include taking out personal feelings, a step-by-step guide to dealing with difficult situations, and being a customer service champion. *Faculty: Amy Woodall, Executive Vice President, Sandler Training, Trustpointe.*

## 2:30 p.m. | Courses Adjourn

## FACULTY INFORMATION

**Timothy S. Blackwell** has 35 years of service with the Indianapolis Metropolitan Police Department. He has 15 years of experience as a Patrol Officer. He also has 17 years of experience as a Vice/Narcotics Detective. Mr. Blackwell is a Certified Instructor for The Civilian Response to Active Shooter Events (CRASE).

**LaJuan D. Epperson** is a Project Manager with Court Technology, Office of Judicial Administration of the Indiana Supreme Court. She heads several INcite applications which includes the Protective Order Registry (POR), POR Advocate Access, Guardianship Registry, IV-D Writ/Warrant Registry, CIP Timeliness Measures Application, Indiana Tax Warrant Application, e-Tax Warrant Search Services, Mental Health Application and the Public Defender Information System (PDIS). Prior to working at JTAC, Ms. Epperson was a Program Coordinator for the Title Division of the Indiana Bureau of Motor Vehicles. She also worked as an Employment Consultant and Case Manager with Noble of Indiana. In addition, she is a United States Marine Corps veteran. She received numerous awards to include the Navy Achievement Medal for outstanding service. Ms. Epperson obtained her Master of Human Relations Degree from the University of Oklahoma and a Bachelor of Science Degree in Human Resources and Management from Park University.

**Hon. Peter R. Foley** has served as Judge of the Morgan Superior Court 1 since 2015. He obtained his bachelor's degree from Indiana University and his law degree from the Indiana University Robert H. McKinney School of Law. He previously served as a County Attorney for Morgan County from 2001-2014. Judge Foley served on the Board of Directors of the Judicial Conference of Indiana from 2015-2016 and as a member of the Task Force on Remote Access to and Privacy of Electronic Records for the Indiana Supreme Court. He currently serves as a member of the Probate Committee of the Judicial Conference of Indiana.

**Kyle C. Gillaspie** has served as a Staff Attorney for the Court of Appeals of Indiana since 2007 and became the Chief Staff Attorney in 2014. Previously, Mr. Gillaspie was a Judicial Law Clerk for the Honorable Margret G. Robb. Mr. Gillaspie is a graduate of Indiana University and the Indiana University Robert H. McKinney School of Law.

**Madeline Green** has 18 years of service with the Indianapolis Metropolitan Police Department. She has 18 years of experience as a Patrol Officer. She is also a Certified Instructor for The Civilian Response to Active Shooter Events (CRASE). Ms. Green is also a Certified Instructor for ALICE (Alert, Lockdown, Inform, Counter, Evacuate).

**Lisa D. Manning** is the Family Violence Resource Attorney for the Indiana Office of Court Services. She functions as a single point of contact for all the state's courts on matters related to civil protection orders, criminal domestic violence processing, best practices, and training. Previously, Lisa managed her own firm in Hendricks County where she was a certified mediator, guardian ad litem, trained parent coordinator, and litigated both civil and criminal cases. Lisa holds a Bachelor of Arts degree from Indiana University and a Juris Doctor from the Indiana University Robert H. McKinney School of Law.

**Janelle D. O'Malley** is an Implementation Specialist for Trial Court Technology, a Division of the Indiana Supreme Court. She has been with the division since 2012, and currently most of her work concentrates on Odyssey and E-filing training, deployment and support. She earned her J.D. in 2011 from The John Marshall Law

School and her B.A. in 2008 from Purdue University. She is admitted to the bars of Illinois (2011) and Indiana (2012).

**Robert Rath** is the Director of Appellate Court Technology for the Indiana Supreme Court Office of Judicial Administration. Bob manages IT for the Indiana Supreme Court and its administrative agencies, and his team delivers shared IT services to the Indiana Court of Appeals and Tax Court. Prior to joining the Supreme Court in 2009, Bob was a consultant and attorney in private practice after spending over twenty years in corporate IT with Technicolor (formerly, Thomson Inc.) and Hanes Brands Inc. (formerly, Sara Lee Corp.) Bob supported a broad range of enterprise applications in manufacturing, supply chain, finance, and HR with Thomson and Sara Lee, and he had expatriate assignments in Mexico with both companies. Bob is a graduate of the Indiana University Robert H. McKinney School of Law (JD), Indiana Wesleyan University (MBA), and the Indiana University Kelley School of Business (BS). He earned his Project Management Professional (PMP) certification from the Project Management Institute (PMI) in 2002. Bob has served on the executive board of the Court Information Technology Officers Consortium (CITOC) since 2010.

**Hon. Loretta H. Rush** took the oath of office as Indiana's 108th Supreme Court Justice in November 2012 after being appointed by Governor Mitch Daniels. The Judicial Nominating Commission named her Chief Justice in August 2014. Chief Justice Rush serves on the Conference of Chief Justices Board of Directors (2nd term) and is co-chair of the National Judicial Opioid Task Force. In addition to being a member of local, state, and national bar associations, Chief Justice Rush is a Life Fellow of the American Bar Foundation. She is an Academy of Law Alumni Fellow for the Maurer School of Law. She chairs or is a member of several commissions (including the Commission on Improving the Status of Children in Indiana and the Judicial Nominating/Qualifications Commission). Prior to her appointment, Rush spent 15 years at a Lafayette law firm and was elected three times to serve as Tippecanoe Superior Court 3 judge. She was born in Pennsylvania and moved frequently as a child before settling in Indiana in 1972. She earned her undergraduate degree from Purdue University and her law degree from Indiana University Maurer School of Law, both with honors.

**Hon. Timothy P. Spahr** has served as Judge of the Miami Circuit Court since 2012. He obtained his bachelor's degree from Indiana University and his law degree from the Indiana University Maurer School of Law. Judge Spahr is a graduate of the Judicial Conference of Indiana's Graduate Program for Judges and now is participating in the Indiana Judicial College Master's Certificate Program with a focus on the history of Miami County Courts. For the past six years Judge Spahr has served as a member of the Judicial Administration Committee of the Judicial Conference of Indiana. He also is a member of the Board of Directors of that organization.

**Gaye Lynn Strickland** is originally from Fairmount, Indiana and received her bachelor's degree from Anderson University, where she majored in Accounting. Upon graduation, Gaye Lynn began working for the Bureau of Motor Vehicles' Internal Audit department. After 10 years and various positions with the BMV, Gaye Lynn joined Trial Court Technology in 2006 where she has been involved in the initial set-up of the Odyssey Case Management System, converting courts onto the application, and overseeing various initiatives related to Odyssey. Gaye Lynn is currently the Director of Odyssey Implementation.

**Katie Wilson** is the Deputy Director of Appellate Court Technology focusing on the applications team. Ms. Wilson has been with Appellate Court Technology in an official role since late 2016 but has worked with the Court on IT projects since 2012. Ms. Wilson received her B.S. in Mathematics from Purdue University and is currently pursuing her MBA from the Kelly School of Business, Indianapolis. Ms. Wilson previously worked as an IT consultant focusing on the government sector, including several years of work with the Indiana Department of Correction.

**Amy Woodall** in her role as Executive Vice President at Sandler Training, Trustpointe Amy Woodall travels the globe working with companies large and small helping to develop a culture centered around service excellence both internally and externally. Amy has become the international face for Sandler's Strategic Customer Care program and helped write and produce the Dealing with Difficult People program. Her passion for teaching organizations how to move customer service from a department to an attitude is instantly felt by her audience. Amy understands at the core of outstanding service is effective and proactive communication.

**Dr. Mary M. Yoke** is a Fellow of the American College of Sports Medicine and has a PhD in health behavior and a master's degree in exercise physiology. She is currently a faculty member at both IUPUI and IU Bloomington, teaching in the departments of kinesiology and applied health science. Dr. Yoke is a frequent speaker at international and national health and fitness conferences; she has presented throughout the U.S. in 49 states and has led workshops in 16 countries. Dr. Yoke is the author of four fitness textbooks and one book on happiness. Her goal is to inspire people to move and experience lifelong wellness.