



**Joint Florida Courts E-Filing Authority/ Florida Courts Technology Commission/ Florida Court Clerks & Comptrollers Pro Se Subcommittee Minutes**

Florida Courts E-Filing Authority Pro Se Subcommittee, comprised of Authority members, Florida Courts Technology Commission members, and the Association's Pro Se/Self Help Committee members, met by WebEx on May 8, 2014, at 10:00 a.m.

The following members were present: Sharon Bock, Esq., Palm Beach County Clerk, Chair; Ken Burke, Pinellas County Clerk, vice chair; Benjamin Carpenter, Esq., Community Legal Services of Mid Florida; Linda Doggett, Lee County Clerk; Al Fraser, Baker County Clerk; Marcia Johnson, Franklin County Clerk; Judge Lisa T. Munyon, FCTC, Chair; Annie Mae Murphy, Taylor County Clerk; Jimmy Midyette, Esq., Florida Legal Services; Melissa Pershing, Esq., The Florida Bar Foundation; Judge George Reynolds; Joseph Smith, St. Lucie County Clerk; Tim Smith, Putnam County Clerk and Authority Chair; John Tomasino, Supreme Court Clerk. Members not in attendance were Judge Martin Bidwill; P. Dewitt Cason, Columbia County Clerk; Bob Germaine, Highlands County Clerk; Scott Ellis, Brevard County Clerk; Bob Inzer, Leon County Clerk; Bill Abbuehl, Esq., Community Legal Services of Mid Florida; and, Ross Baer, Esq., Legal Aid Society of Palm Beach. A quorum was present.

I. Roll Call

Ms. Sharon Bock, Esq., Chair, opened the meeting at 10:03 a.m. with a roll call. She noted that the committee began by coordinating Courts, Clerks and now has added Legal Service providers. She shared that the goal of the committee was to provide the pro se filer meaningful access to electronic filing. She asked Beth Allman to call the role.

II. Approve February Meeting Minutes

Ms. Bock asked for review and approval of the February minutes. Judge George Reynolds moved approval of the February minutes. John Tomasino seconded the motion. All voted favorably.

III. Update on FCTC Access Governance Board

Ms. Bock told the group about the recent meeting of Judge Hilliard's FCTC Access Governance Board where they made a distinction between accessing the portal and the ability to view documents. She also commented that AOSC 14-19 recently came out which governed what documents or files that filers can see. Judge Reynolds asked

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when pro se filers will have access to file on the portal. Tom Hall responded that the E-Filing Authority Board voted to add them in the June 20 release.

Ms. Bock directed the committee to look at steps and if they agreed to the directions, they could take it to the FCTC. She felt that forms and training will be at a decided later point.

Judge Munyon asked if pro se would be able to file before the A2J tool is ready. Ms. Bock responded that they would be able to file this summer. That would then give the committee time to decide on education. She reviewed the recent recommendation made by the Judicial Management Council (JMC) and the Clerk's letter to the HCief Justice asking for clarification on that recommendation. She suggested they wait until the Clerks get a response from the Chief Justice to get a better picture of what the JMC is looking at. However, she expressed a desire to move ahead with access to file.

#### IV. E-Filing Authority Board Recommended Registration Process

Mr. Tim Smith, chair of the Florida Courts E-Filing Authority shared with the board the decision that was made this past Monday by the Authority to add pro se filers with the next portal software release on June 20, 2014. He reported that he would be sharing that with the FCTC next week. He clarified that this would provide pro se filers the ability to access and use the portal, not to view documents. Benjamin Carpenter asked if anyone had worked with A2J before? Ms. Bock responded positively, explaining that when the portal was opened in 2010, A2J came with it. She explained that some clerks already have their own interactive forms, but the decision made by this committee was to use A2J. She commented that it was already being used in over 30 states. Mr. Carpenter asked how the funding was secured? Melissa Pershing responded that the Florida Bar Foundation funded legal aid across the state. Ms. Bock clarified that the A2J license was provided with the portal; it is embedded in the portal. She said that at the end of the A2J interview, the filer can hit "send" and file the document.

Judge Reynolds asked if the family law forms that would be used were those approved by the state Supreme Court. Ms. Bock said that they were. She continued, explaining the need for uniform forms. She said that the goal was cost-effectiveness, reach (access), and uniformity. She further emphasized that only Supreme Court approved forms will be used. Mr. Carpenter asked how the forms used in A2J handle notary blocks? Ms. Bock responded that A2J had many components and the committee would continue down the path, even identifying what rules should be changed. Mr. Carpenter emphasized the need for coordination between this committee and the Vision 2016 Committee of the Florida Bar. Ms. Pershing

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commented that she felt all are on the same page as they consider access. She just returned from Nation Equal Justice Conference where the Access to Justice Commission chairs from all over the country were in attendance. They all realize how critical it is to work together.

V. Demonstration of Pro Se Access

Jennifer Fishback presented a PowerPoint on how a pro se filer would register and use the portal. Jimmy Midyette asked if we had taken into account the increased number of calls to the helpdesk this may generate? Tom Hall responded affirmatively and explained that it was believed that once A2J was available all the questions will be about AJ and will need to be rerouted.

Judge Reynolds asked when judges would be able to access the portal. Jennifer Fishback responded that the judges would be added in the June 20 release. Ms. Bock remarked that at the recent Authority meeting Chairman Tim Smith also asked staff to look into adding other filer types

VI. Outstanding Issues

Ms. Bock suggested the committee discuss the other issues that go with adding pro se, such as education and how to use A2J, at a later time. At this point, she asked for a motion that the committee accept the ability for pro se filers to access the portal. Linda Doggett made the motion. Ken Burke seconded the motion. Should the motion pass, she explained, the committee voice would be added to the Authority recommendations and the Access Board recommendations for FCTC next week. There was no discussion and all voted favorably.

Ms. Bock thanked all committee members for their assistance. She agreed that everyone's input is needed and is helpful to keep the issue moving forward. She noted that she will decide after FCTC when to call the next meeting of this committee.

Mr. Burke acknowledged Ms. Bock's hard work as the voice of pro se litigants across the state. Judge Reynolds spoke in agreement. Mr. Smith said he hopes this committee would continue to put pressure on the JMC to keep this issue moving and continue the good work.

Mr. Carpenter expressed willingness to be the liaison for any national teams, if needed. Ms. Bock expressed the desire to be doing some demos of AJ and that she is waiting to hear from the Chief Justice. Judge Reynolds said, in his role as chair of the FCTC e-Portal committee, he feels all parties are moving forward.

VII. Adjourn

Seeing no further discussion, the meeting was adjourned at 11:41 a.m.