Q&A from Forms Camp Review & Revision
August 17, 2022

1. **What's the name of the guide that allows someone filing to answer interview type questions?**

   Maryland: Guide & File, which is a Tyler product. http://www.guideandfile.com/

   Minnesota: Guide & File, which is a Tyler product. For Minnesota-specific interviews and Guide & File information, check out our "Minnesota Guide & File" Help Topic (mncourts.gov/Help-Topics/Guide-and-File.aspx).

2. **What software do you use for the revision site?**
   In Maryland, we create and revise our court forms in Word, then convert to fillable PDF.

3. **How does the public sign up to receive form change notifications? RSS? Something else?**

   Maryland: Email request, where you are added to a distribution list.
   https://mdcourts.gov/district/forms/formsinstruction#revnotice

   Minnesota: Unfortunately, we do not have a mechanism in Minnesota for the public to sign up for form change notifications. Court staff and judicial officers can sign up for notifications regarding the posting of new forms or revisions to existing forms from our Forms Management SharePoint site. When someone sets up the notifications, there are several options:

4. **What software runs the revision site in Maryland? is it the Tyler software?**

   Maryland uses Adobe Dreamweaver and Drupal for our websites.

5. **What format do you create fillable forms? Word or PDF?**
   In Maryland, we create and revise our court forms in Word, then convert to fillable PDF.

   In Minnesota, the document starts out in Word. We use Adobe Designer, part of Adobe Experience Manager, to create our fillable smart forms.

6. **Are any attorneys involved in staffing the subcommittee, drafting forms or reviewing them?**

   Maryland: Attorneys may request revisions or the creation of new forms, but only judiciary employees staff the subcommittee.

   In Minnesota, the Forms Manager is a licensed attorney, as are many of the subject matter experts and self-help center staff. Our Court Operations Advisory Workgroup (COAW) is made up of judicial officers and court administrators, and some court administrators have a law degree.

7. **What software is used to manage Forms? are the PDF forms XFA or Accroform? We have issues with displaying XFA Forms on Browser and decided to convert to Acroform**
   Maryland: We use Adobe Designer, part of Adobe Experience Manager. Forms are saved as xfa. You need Adobe reader available to open form to use all the functionality of the Fillable Smart Form posted on website. Saved as pdf then.

   Minnesota uses Adobe Designer, part of Adobe Experience Manager, for our fillable smart forms. Fillable smart forms are saved as xfa. You need Adobe reader available to open form to use all the functionality of the Fillable Smart Form posted on website. Saved as pdf then.

8. **Does every form have a list of citations to what laws they work with or reference or such? Or is this just an internal thing.**
   Each form in Maryland includes a statutory or Rule citation as a subheading under the form title.

   In Minnesota, many of our forms include a statutory citation as a subheading under the title of the form. Our instructions frequently include statutory and rule citations with links so that anyone so inclined can look up the law or rule on a particular subject.

9. **Can you talk about what "fillable smart forms" means?**
   Check out our Help Topic on court forms (the FAQs tab could be particularly helpful) -
   https://mncourts.gov/Help-Topics/Court-Forms.aspx

   In Minnesota, fillable smart forms are dynamic PDFs with built-in intelligence and expandable fields. Some questions are hidden and will appear only if called for (for example, if a person answers YES to a particular question, follow-up questions will appear). When a person chooses the county in a caption, the judicial district automatically populates. When a person types in the name of the petitioner, that name will generate on the form in every location that calls for petitioner's name.

We have a process embedded within our fillable smart forms that allows a person to flatten the documents in order to eFile.

10. **Can you talk more about the Smart Forms? What software do you use?**
Fillable smart forms are Adobe fillable PDFs with built-in intelligence. For example, when a person chooses the county in a caption, the judicial district automatically populates. When a person types in the name of the petitioner, that name will generate on the form in every location that calls for petitioner's name.

Minnesota uses Adobe Designer, part of Adobe Experience Manager.
https://mncourts.gov/Help-Topics/Court-Forms.aspx

11. **How many full-time staff do you have who are dedicated solely to forms? Or does everyone in the forms committees' have other jobs?**
In Maryland we have three (3) Forms Coordinators, one (1) Lead Coordinator, with the Deputy Director and Director overseeing the process.
https://mdcourts.gov/district/directories/headquarters#admins

In Minnesota, there are two full-time positions dedicated solely to forms. The Forms Manager is the point of contact for all things form-related. Another staff person focuses on developing and maintaining Guide & File interviews and fillable smart forms. Everyone else involved in the form review and revision process have other jobs within the Branch.

12. **Do you ensure that your internal translators are ATA-certified? Or at least NCSC-certified interpreters? If not, how do you account for quality?**
Minnesota uses an outside company for forms translations.

Maryland: https://mdcourts.gov/interpreter/translationservices

13. **What case management system do you use and how do you integrate the court forms?**
Both MD and MN uses Tyler Technologies and uses the "Guide and File," a Tyler product.
https://mdcourts.gov/mdec/about

14. **Why is it so important to keep prior versions of forms?**

Maintaining version control records ensures a detailed historical record of form amendments changed by procedure, practice, or legislation, citing Md. Code, the Rules, statutes, or other legal references, as applicable.

15. **I am new to Forms Camp. Are we able to access the slides on NCSC's website?**

Yes, all prior sessions are available here: www.ncsc.org/formscamp2022 and materials and recording of today's session will be posted by the end of the week.

16. **Is there a standard naming practice for VARIABLES that appear in forms? Is it always "LastName" or "Last_Name" or "lastname"?**
All standard line identifiers are consistent in Maryland throughout our forms, including contact information fields.

    In Minnesota, we use the standard tokens in Guide & File created by Tyler Technologies, as needed. In our fillable smart forms, we have standardized tokens based on a template. It's important that you come up with a standard for variables that works for your court system.

17. **Could they share the "form" to request a change in form.**
Maryland:
https://mdcourts.gov/sites/default/files/courtforms/courtforms/joint/ccdc076.pdf/ccdc076.pdf

    Minnesota, see page 5, 6

18. **To the extent data exchanges are happening - justice partners, CMSs etc - is anyone working on NIEM compliance, or OASIS extensions?**
In Maryland, those data exchanges are handled by our IT team at Judicial Information Systems (JIS).

    In Minnesota, the data exchanges are handled by our IT team and Business Process and Education Unit.

19. **Do you pay your subject matter experts?**

    Our subject matter experts are either employees of the judiciary or court related agencies.

    We do not pay subject matter experts in Minnesota.

20. **What are the five languages that the forms are translated into?**

    Maryland: https://mdcourts.gov/languageservices Español | Français | русский | 한국어 | 中文

    In Minnesota, our top 3 languages, after English, are Spanish, Hmong, and Somali. Our Karen population is growing, and that is quickly becoming a requested language for translations. However, different parts of the state have different concentrations of people who speak other languages.

Court Form Change Request

Name: Title:

Phone Number or Email:

This is a request to change an existing form.

Form Number: Form Name:

Revision Date (from footer of the form):

Form Location (check all that apply):

☐ MJB public website   ☐ CourtNet   ☐ MNCIS

☐ Other:

Policy 503(a) requires a person to get local approval before submitting a request to change an existing form. Who reviewed your request at the local level?

FOR MNCIS FORMS:

Where is the MNCIS form located? (check all that apply)

a. ☐ Case Form (aka Forms Button)

      i. Designate the categories where the form is currently available:
      ☐ Civil   ☐ Criminal
      ☐ Family   ☐ Probate

      ii. Do you need to select the recipients to receive this form?   ☐ Yes   ☐ No

      iii. Should the form be configured for Merge to PDF?   ☐ Yes   ☐ No

b. ☐ Hearing Notice

      In which of the categories is the form currently available?

      ☐ Civil   ☐ Criminal
      ☐ Family   ☐ Probate

c. ☐ Minutes

d. ☐ Protection Order

e. ☐ Other:

Contact person for testing and questions:

FOR ALL FORMS

MNCIS Event Code(s) for this form:

What Court Administration Process (CAP), if any, applies to this form?

What changes are you requesting?

Why are these changes necessary?

What impact, if any, will these changes have on current court processes?

Level of urgency (please explain):

INSTRUCTIONS

Are there instructions for this form?   ☐ N/A (this form is not for SRLs)

☐ Yes: Court Form Number

                  Will the instructions need edits as a result of this form change?

☐ No (Please complete the Instruction Questionnaire)

ATTACHMENTS

New Court Form Request

Name: Title:

Phone Number or Email:

This is a request to develop a new form.

Proposed Form Name:

Area of Law (for example: civil, criminal, family, probate):

Where should the new form be located? (check all that apply)

☐ MJB public website   ☐ CourtNet   ☐ MNCIS

☐ Other:

Policy 503(a) requires a person to get local approval before submitting a request to change an existing form. Who reviewed your request at the local level?

FOR A NEW MNCIS FORM

What should the form name be that the user sees when searching for the form?

Where should the form be added? (check all that apply)

a. ☐ Case Form (aka Forms Button)

      i. Designate the categories where the form should be available:
         ☐ Civil   ☐ Criminal
         ☐ Family   ☐ Probate

      ii. Do you need to select the recipients to receive this form?   ☐ Yes   ☐ No

      iii. Should the form be configured for Merge to PDF?   ☐ Yes   ☐ No

b. ☐ Hearing Notice
      In which of the categories should the form be available?

         ☐ Civil   ☐ Criminal
         ☐ Family   ☐ Probate

c. ☐ Minutes

d. ☐ Protection Order

e. ☐ Other:

Contact person for testing and questions:

Should this form be configured in the Forms for Signature Workflow for Task Manager? ☐ Yes ☐ No

List consensus received from other Task Manager Districts:

FOR ALL NEW FORMS

Likely MNCIS Event Code(s) for this form:

What Court Administration Process (CAP) is or could be related to this proposed form?

Why is this form needed statewide?

Are there any process concerns regarding this proposed form?

Level of urgency (please explain):

Please include a draft of the proposed new form if possible.

INSTRUCTIONS

Have you developed instructions for this form? ☐ N/A (this form is not for SRLs)

☐ Yes (please include)

☐ No (Please complete the Instruction Questionnaire)

ATTACHMENTS