JET File
external advisory group
agenda and meeting minutes

Project:	**JET FILE**
Meeting:	JET File go-live update and UAT completion celebration

Date-Time-Location:	June 7, 2011 / 1 – 3:00 p.m. Room 1304, 13th floor
External Invitees:	Beatrice Yao, Danny Teklehaimanot, Gina DeCarlo, Jake Greenwell, Richard Brophy, Julie E. O'Callaghan, Brian Schwabauer, Caroline Kang, Josh Bright, Denise Spelzini, Katherine Borlaza, Amit Khosla, Sivakumar Ponnuswamy, Brenda Ramirez, Mike McClain, Carolyn Bradford, Jo Salomon, Andrea Coletto, Renee Sherman, Dan Jakle, Ed Weston, Justin Gieger, Chris Floyd, David DePaulo, Eric Knight, Julia Burns, Stephen Schneider, Doug Kim, Linda Atcherley, Phil Schott, Matt Herreras, Gary Gallagos, Joel Hecht, Peter Harlow, Todd McDonald, Jim Cole, Joe Carresi, Jose Gonzales, Steve Pineda, Martin Dean, Rob McGrath, Steve Cattolica, Kim Lincoln-Hawkins, Tara Lewis, Denise Yip, Margo Hattin, Sandy Trigg, Ilicena Elliott, Sean Blackburn, Marygrace Coneff, Steve Suchil, Yvonne Lang, Ryan Hitchings, Marc Glaser, Paul DeFrances, Lorie Kirshen, Dale Clough, Carolyn McPherson, Kimberly Weaver, Jackie Young, Eric Hansen, Khalid Minhas, Dan Mora, Wolf Schubert, Johnny Fuery
DWC / DIR IS invitees:	Chris Bailey, Dave Cohen, Jim Culbeaux, Chuck Ellison, Susan Hamilton, Joel Harter, Shirley James, Peter Melton, Destie Overpeck, Jim Wang, Nina Kot, Nina Thayer, Jackie Chang, Michael Jovero, Dominic Wu, Dale Klein, Sreelaxmi Surswari, Angela Michael, Kathy Patterson, Ming-Tao Liou, Keven Star, Nazila Tobaei, Melissa Hicks
Facilitator:	Susan Gard
Meeting minutes taken by:	Janet Tsao

	Agenda 06/07/11	Owner
1.	Open meeting	Susan Gard
2.	JET File update	Susan Gard
3.	UAT update	Joel Harter
4.	UAT technical update	Jim Wang
5.	Go-live status	Jim Wang
6.	Business rules update	Chuck Ellison
7.	Trading partner agreement	Susan and Chuck
8.	JET vendor software testing	Chuck

1.	**Open meeting** This is a combination of in-person meeting, web conference and teleconference of the EAMS external advisory group.	Susan Gard
2.	**Overall update** Reference "EAMS External User Advisory Group, June 7, 2011" Power Point presentation. Overall status of the project is reflected on the timeline ticker posted on the DWC Web site. From external user perspective, the first visible result of our work was the lien conference capability on the DOR. The next visible result was the public information case search tool, which went live in December 2010. This tool was developed with input from the group and it is overwhelmingly successful. User acceptance testing (UAT) of JET File will conclude by the end of June.	Susan Gard
3.	**UAT business update** UAT started on May 3 with five vendors: QuickEAMS, ARS Legal, DWC Direct, CompData and Tritek Case Management. The first day proved to be a challenge and a successful filing was not accomplished until the third day. The testing was smooth thereafter. All five entities have successfully finished testing. State Fund began testing this week and hopefully will be done by the end of the week. Thanks to all UAT participants and Office of Information Services (OIS) staff who worked on UAT. Everyone was very responsive. The testing went well and DWC appreciates all the camaraderie.	Joel Harter
4.	**UAT technical update** Batch is the process EAMS uses to process files and attachments into EAMS or send back error responses. Batches run in two hour cycles. A limiter will be put in place to safeguard EAMS and ensure that batches don't stop mid-cycle. If a file doesn't get processed because of the limiter, it will process in the next batch process cycle. Filer will get level 1 (L1) and level 2 (L2) responses. Level 3 (L3) response states file was successfully received. L3 response is sent out daily. Level 1 response lets you know that package was received. Level 2 response gives specific errors almost immediately. In OCR, it takes a person to identify the error and it will be returned to filer with notice of discrepancy. You get a resubmission ID with L2. Resubmission ID connects to date and it is preserved as the	Jim Wang

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	filing date. Question: Will there be a notification when batch is full? Answer: No. DWC will consider writing up a change request to provide error notification when a batch is full. Question: Is there a limitation? Answer: Batch process is low between 6 a.m. – 12 p.m. and high activity between 4-5 p.m. If there are too many batches in the process, it will stall out. That's why a limiter is needed—to ensure the batch process doesn't stall before it's completed. Question: When is the file date stamped? Answer: Date stamped is the day the file is received by DWC. If received after 5 p.m., date stamped will be of following day.	
5.	**Go-live status** JET File will go-live on June 27, 2011.	Jim Wang
6.	**Business rules update** The latest business rules updates are posted on the EAMS Web site. The latest changes are highlighted in golden-rod. Suggestion: provide legend for the different colors.	Chuck Ellison
7.	**Trading partner agreement (TPA)** Latest TPA draft is posted on the EAMS Web site. TPA Word document is your narrative and instructions. You will fill in Excel spreadsheet that allows DWC to capture information and maintain a database of all filers in JET File. DWC only needs the spreadsheet. Third party filers (TPF) have a separate spreadsheet that includes clients who have completed authorization with the TPF. State Fund sent comments by email. Email comments on business rules or TPA to EAMS@dir.ca.gov by June 10th. We will finalize and post them following week. **User account criteria** JET File is for those who file 100 or more of any single form annually by OCR or e-forms. Largest filers get JET File accounts first in order to get paper out of the system. DWC created a list of 600 names of those largest filers of the six forms.	Susan and Chuck

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	Once we finish UAT, we will publish software vendors and third party filers (TPF) on the DWC Web site. The 600 largest filers can select from the approved vendors listed. 90 days after go-live, we will review: • how the system is handling the increase • how we're handling the additional workflow. **Question**: Will DWC consider a combination of the six forms to qualify to use JET File? **Answer**: DWC may consider 100 or more of a combination of six forms after the initial 90 days.	
8.	**JET testing post go-live** JET vendor software testing (VST) will be done every other month. VST uses the pre-production environment. Tests are for two weeks, Monday - Friday from 9 a.m. to 4 p.m. Run batch process every hour. Mandatory phone conference to be held the Friday before testing starts. DWC will provide email address for business or technical questions during this process. DWC will post names of those who have successfully completed testing as having been validated. We will re-evaluate process as it goes. **Question**: How many additional requests has DWC received? **Answer**: Two so far. **Question**: e-Candidus completed UAT as Quick EAMS. Will e-Candidus have to go through VST? **Answer**: Each filer has one company name in JET file. QuickEAMS is the JET Filer. **Question**: Is there any other way to electronically file in addition to JET File and e-forms? **Answer**: No, e-forms and JET File are the two electronic ways to file with DWC. **Question**: When new forms are added to JET File, will vendors need to validate that new form or validate their entire system? **Answer**: Most likely just the new form, assuming nothing else has changed. **Question**: When will we add additional forms? **Answer**: It is safe to say that we will not add new forms in next six months. We have not worked on internal change request during this entire development period. We need time to settle with JET File and the change control board will determine priority for change requests. **Question**: Can law firms file by paper? **Answer**: Yes, you may but we encourage everyone to join the e-	Chuck

	team and file electronically. If you file by JET, you may also file OCR and e-forms if in the e-forms trial.	
9.	**JET File demonstration** There are three ways to connect to JET File. - Purchase approved software that allows end user to file - Use the services of a third party filer who will file on your behalf - Build your own pipeline using the specifications from the DWC Web site. ARS Legal developed software - TruFile Professional. It is software that allows end user to JET File. During UAT, ARS Legal filed the application for adjudication of claims (ADJ) and received ADJ number that same afternoon. DOR expedited trial is filed during the demonstration. Clicked and dragged the form and attachments into JET File. DWC prefers PDF documents, so all attachments are converted to PDF before they are filed. JET File sent error response within minutes. L2 error response with the specific error was sent back to the filer. Justin fixed the error by checking a box and resubmitted. A few minutes later, L3 response was returned and showed the submission is successful. DWC shows what it looks like in EAMS. DOR with S signature and proof of service were reviewed along with all attachments. DWC judge and the court system can access the file (forms and attachments). In EAMS, DWC can view all events, tasks to judges, etc. EAMS is a full DWC internal case management system. Public information search tool is available on the DWC Web site to view all publicly available information. It provides information external user group deemed as useful. **Question**: Does JET File return the PDF? **Answer**: PDF is created by the filer. This allows filers to save forms and attachments on the front end before they are submitted to DWC. **Question**: What legal requirement does JET File have to serve the opposing party? **Answer**: None. It is the responsibility of the filing party. JET File forms are standardized and vendors have to mirror DWC forms. It is in the business rules.	Justin Geiger and Chuck Ellison

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	Send suggestions to eamssuggesstionbox@dir.ca.gov	
10.	**Acknowledgements** DWC recognized all UAT participants and expressed appreciation for their partnership. - TriTek Case Management - CompData - ARS Legal - QuickEAMS - DWC Direct - State Fund DWC and OIS staff who were instrumental to the success of JET File. - Charles Ellison - Dale Klein - Dominic Wu - Ira Phillips - Jackie Chang - Jim Wang - Joel Harter - Kathy Patterson - Michael Jovero - Ming-Tao Liou - Nazila Tobaei - Nina Kot - Nina Thayer - Sreelaxmi Surswari Susan Gard was recognized for taking ownership of EAMS and leading the development of present term solution and JET File.	Destie Overpeck and Keven Star