Announcement Form and BOX Permissions Guide

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Civil Courts Technology Team

April 24th, 2024

Version 1.1

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Summary

The Travis County Civil Courts required a new process and application to digitize Announcement forms, automate BOX folder permissions for exhibit sharing, streamline announcement form submissions/reviews, and enable attorneys to add additional BOX folder permissions. This new process will affect Civil District and County settings, excluding Protective Order settings, which will continue to use the current process for announcements. This guide will detail this new process by role (Attorneys, Court Administration, and Court Reporters) and provide further feature instructions. Taken together this new process and application should allow for attorneys to submit and edit their announcement forms more efficiently, it will allow Court Administration to process and review those forms within a more streamlined existing announcement queue, it will allow parties to upload, and review exhibits a lot sooner, and it will expand the exhibit access and folder creation functionality to participating attorneys.

Attorneys

This new announcement workflow will replace the announcement form .PDF with a digitized version within the existing Civil Calendaring Online (CCO) announcement request process. It will allow attorneys to upload exhibits after an announcement has been authorized, review other party exhibits prior to court assignments, and add additional BOX exhibit folder permissions without the need of contacting the assigned court. The new Announcement Application will allow for attorneys to launch their exhibit folder and add additional BOX exhibit folder permissions.

Announcements

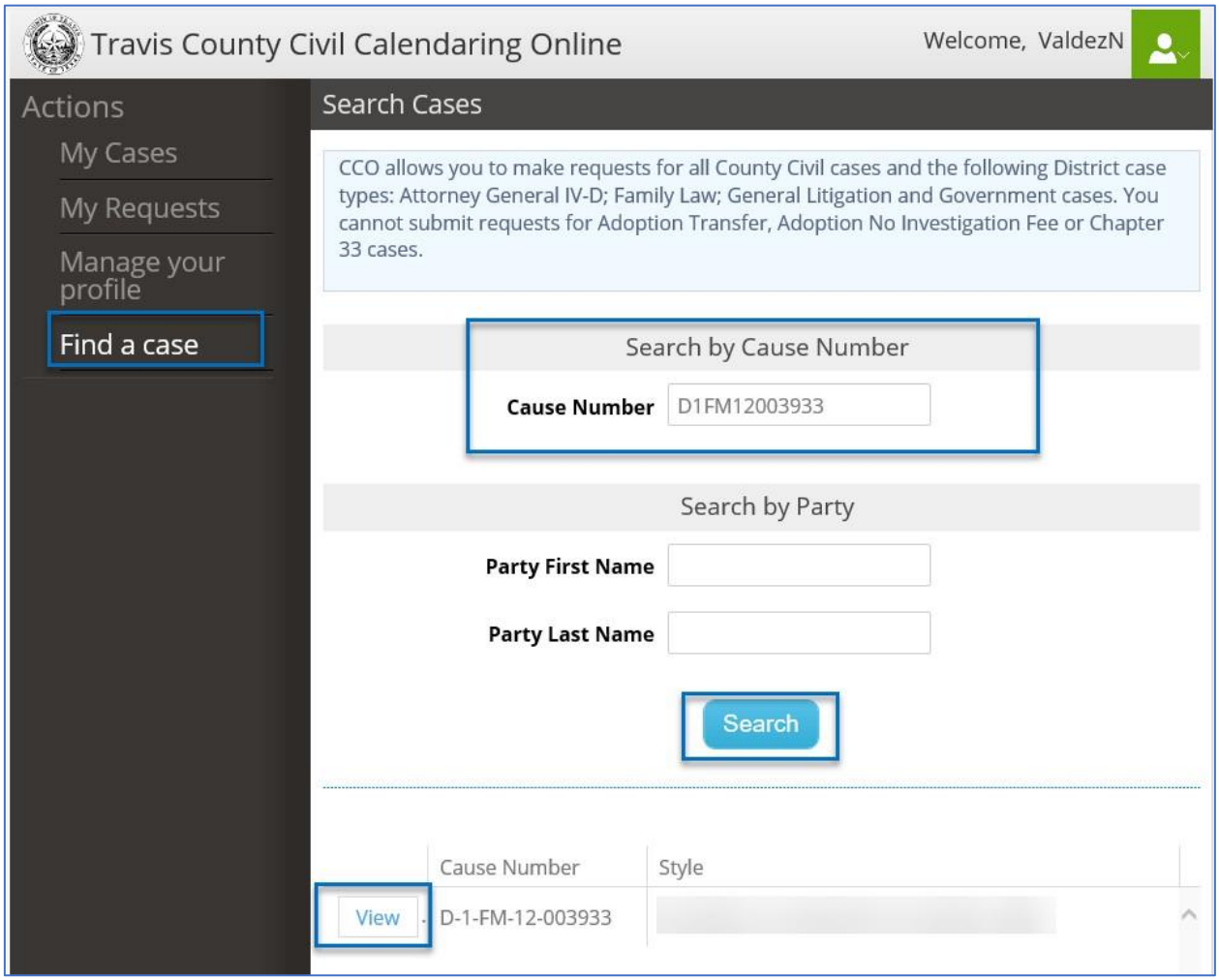
This new announcement process begins after an attorney has requested a setting through CCO or Court Administration. We are using the announcement form and announcement timeframe to automate some of the announcement authorization and BOX exhibit folder permission processes. An attorney will announce on their setting from the Monday before their setting week until Wednesday at 5 pm the week before their setting.

Civil Courts Online (CCO)

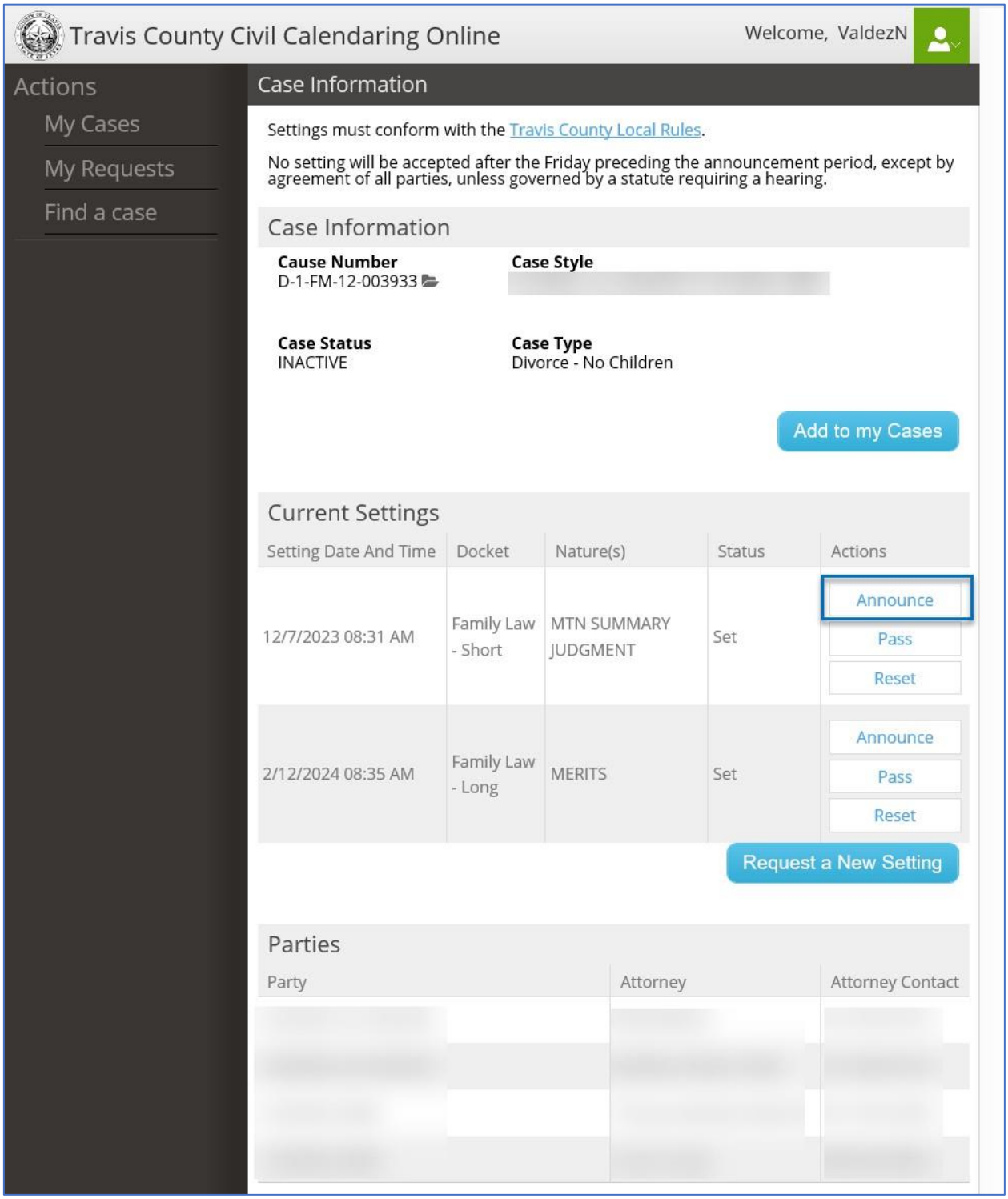
As an announcing attorney, I can now fill out the Announcement question from CCO and provide all of the parties (including legal staff) who need access to the folder for uploading and reviewing exhibits for a hearing.

1. Open Civil Calendaring Online and login
    a. https://courts.co.travis.tx.us/cco

2. Select *Find a Case* and add the Cause Number for the case needing an announcement, then select *Search* and then *View*

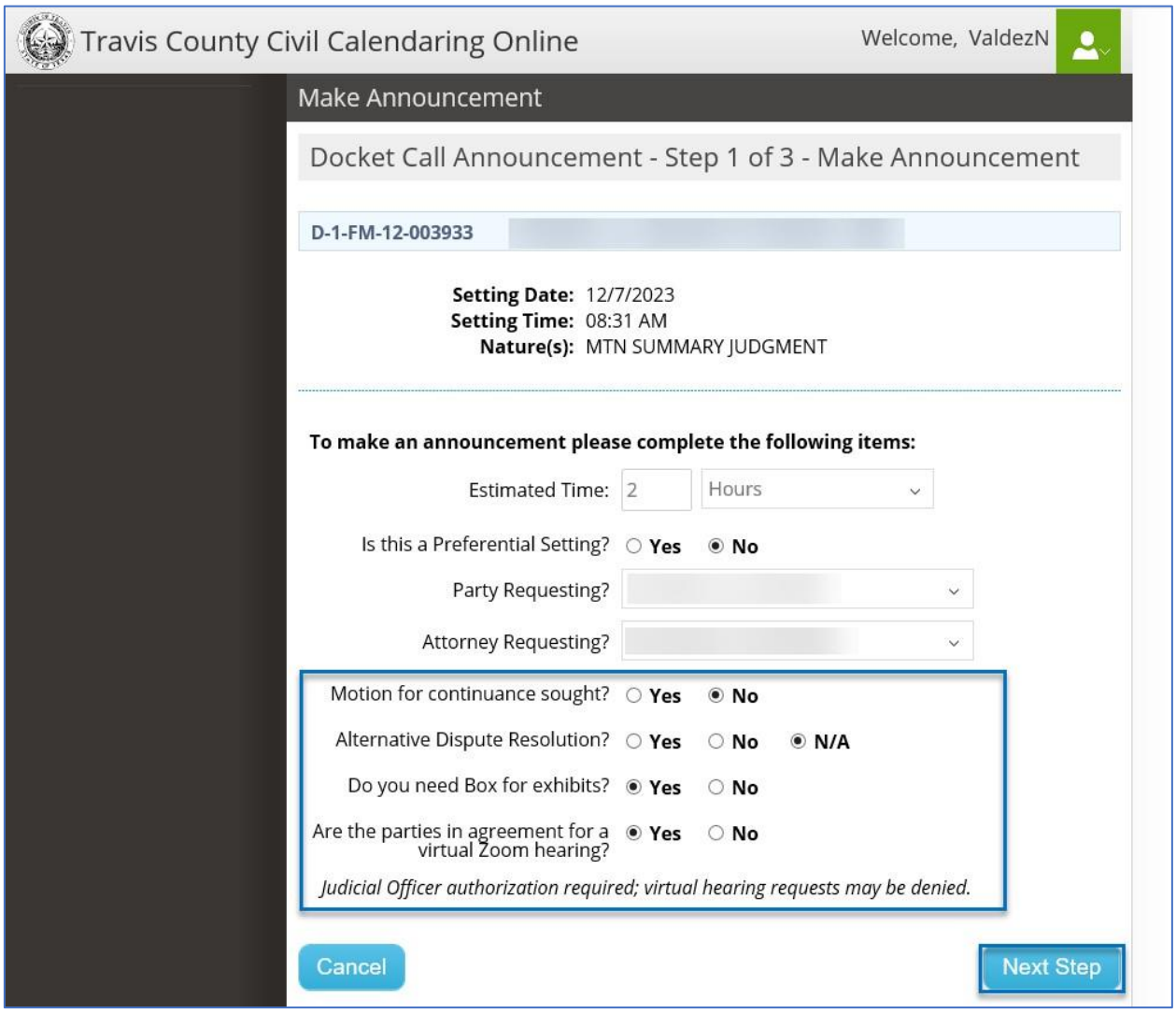


3. From the Case Information page, select *Announce* on the appropriate future setting

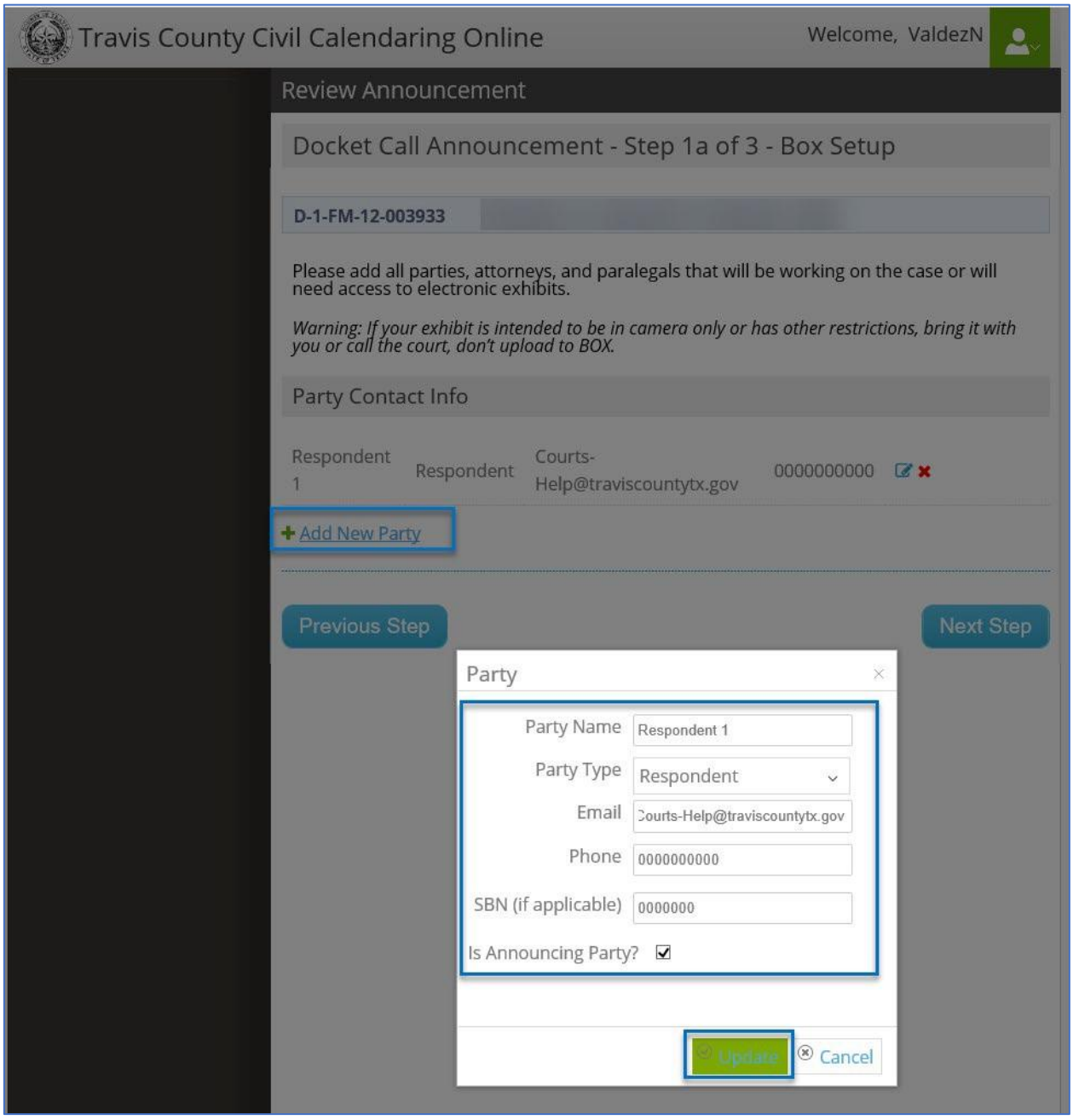


From the Announcement Page, you will see additional announcement form questions that need to be answered, including the requirement for BOX exhibit sharing and request for remote hearings. **Requesting a virtual hearing requires Judicial Officer authorization.**

4. Fill in the announcement form based on the setting requirements and then select *Next Step*

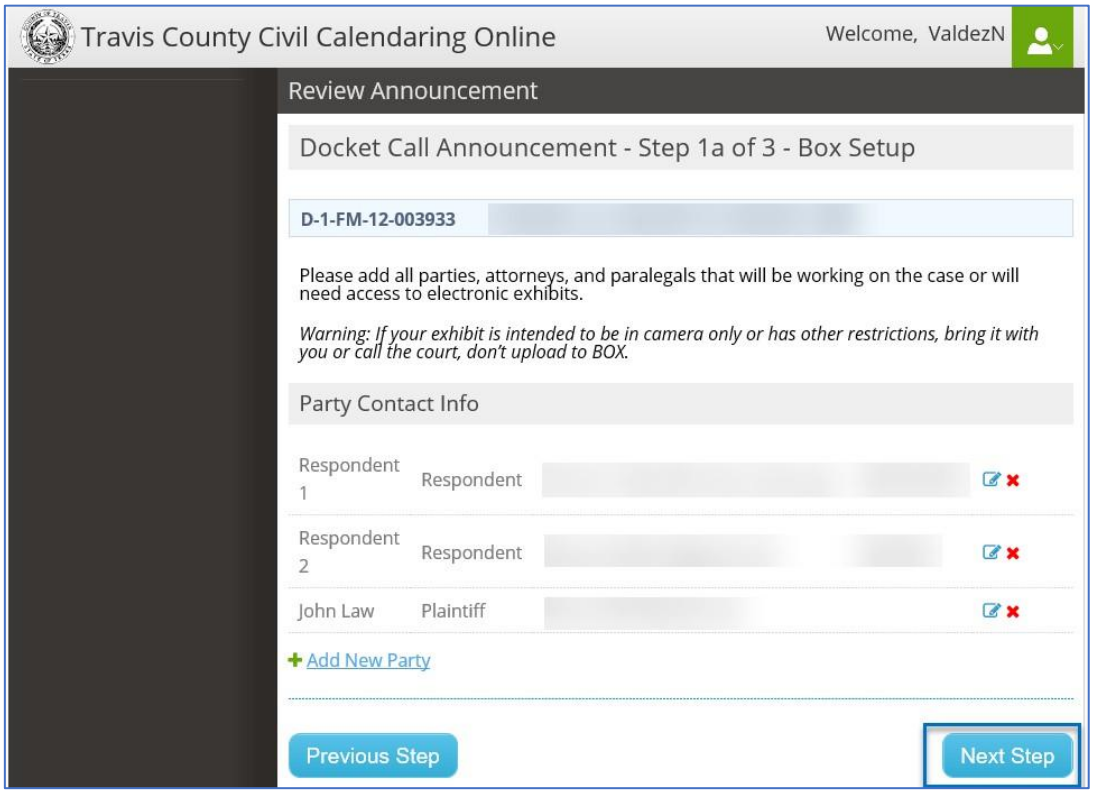


5. From the Docket Call Announcement BOX Setup page, add all parties, attorneys, and paralegals that will be working on the case or will need access to electronic exhibits. This requires the party name, party type, email address, phone number, state bar number (if applicable), and announcing party identifier. You can have multiple email addresses associated with the same party name and type. Select *Update* to add each associated party

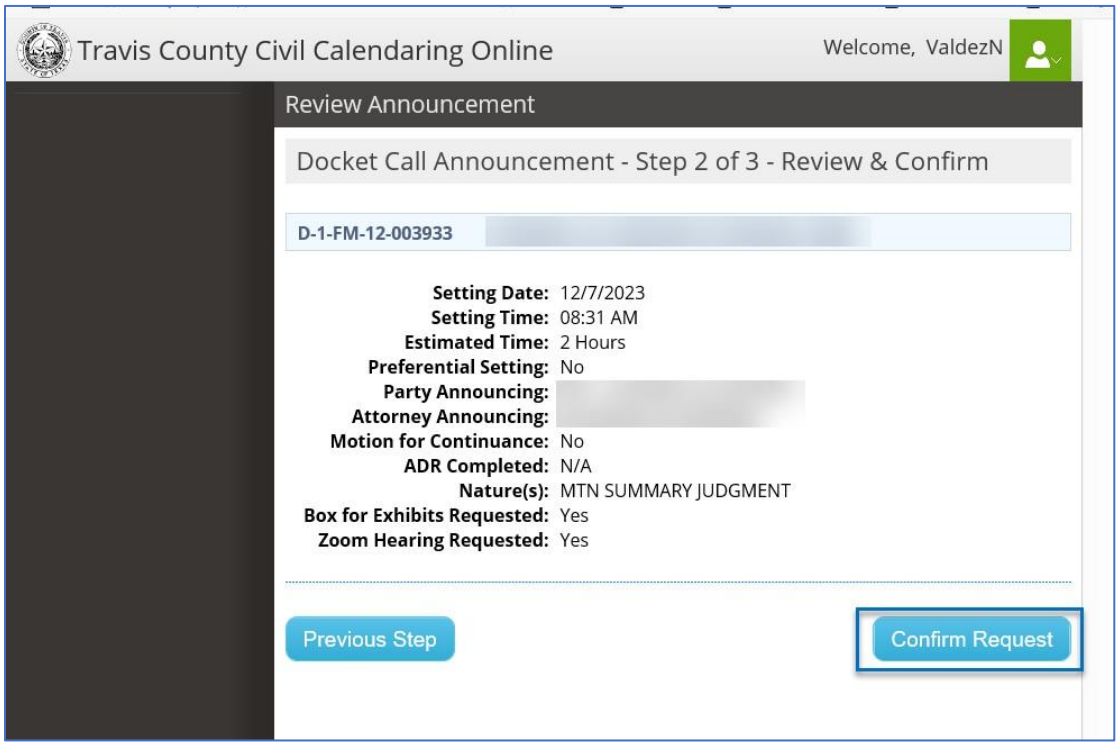


These parties and email addresses are directly linked to the BOX exhibit folder types and permissions that will get auto generated, **so it is important that the announcing attorney lists all parties on the case.** BOX folder access will still be linked to a BOX account, so it is required that the party needing access to the exhibit folders has registered for BOX using the same email address being used above.

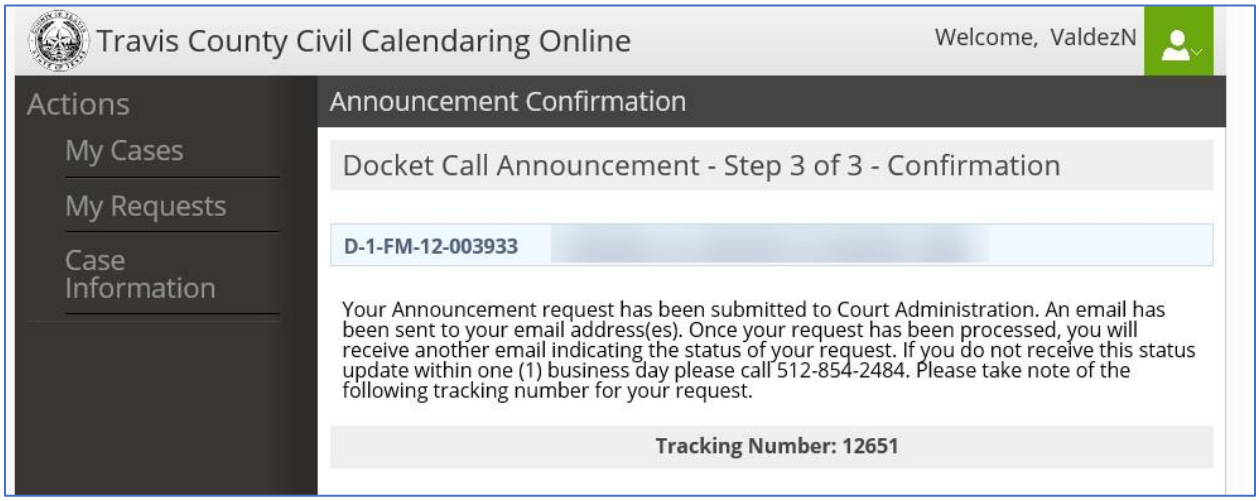
6. After adding all of the participating parties and legal staff needing access to the exhibit folder, select *Next Step*



7. From the Review & Confirm page, select *Confirm Request* if setting request details are accurate



8. You will receive a confirmation of submission description when the Announcement and BOX request has been submitted



At this stage of the process, Court Administration will review and accept or reject the Announcement and BOX request. Once the Announcement and BOX request has been accepted, all parties listed in the BOX setup page will receive an email and access to the BOX exhibit folder associated with the announced setting.

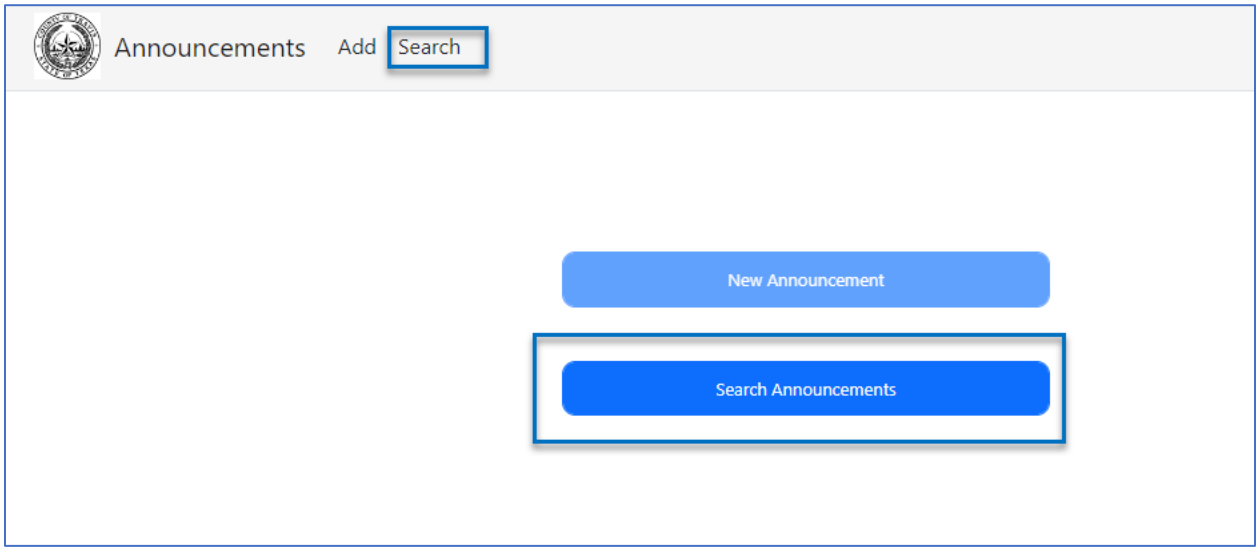
Announcement Application

Once an Announcement and BOX request has been accepted attorneys will be able to manage and access their exhibit folders and permissions from a new Announcement Application. Existing users of CCO will automatically be registered for the new application and new CCO user requests will default this new permission during registration.

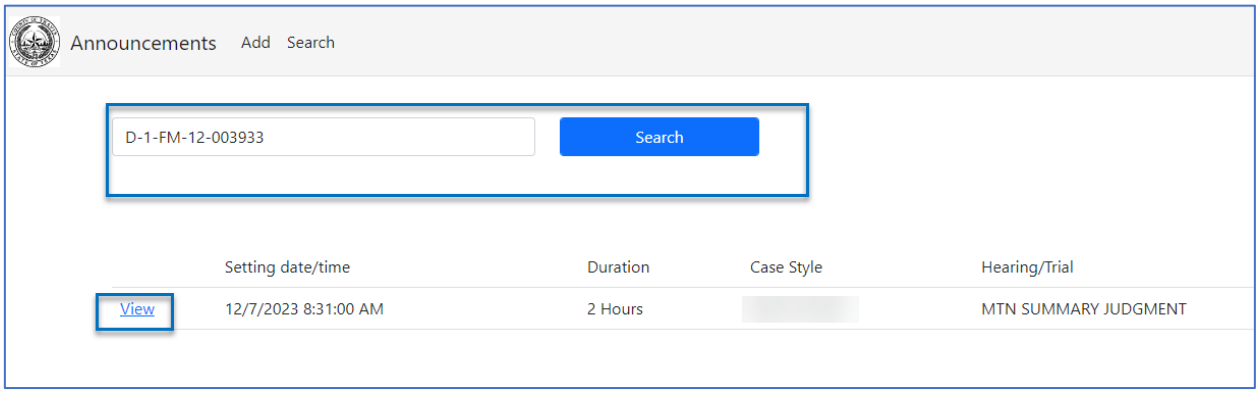
1. Open the Travis County Courts Application Portal
    a. https://traviscourtsapplications.org/portal

2. Select Announcements *Login*, and login using your existing CCO username and password

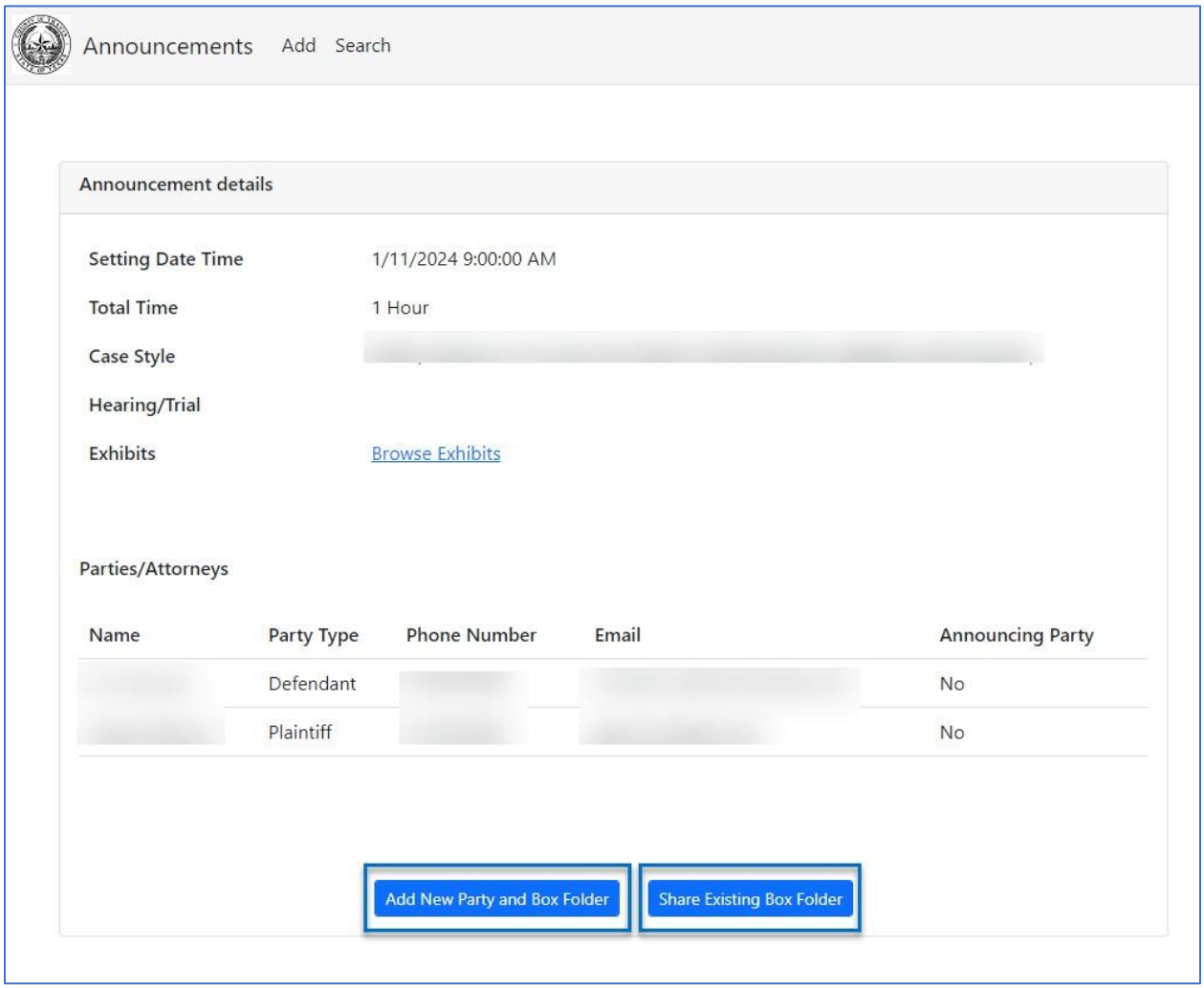
3. From the Announcement Application, select *Search Announcements*
    a. https://courts.co.travis.tx.us/announcements



4. Search for the Cause Number for the setting requiring additional BOX exhibit folder permissions, select *Search* and then select *View* for the appropriate setting

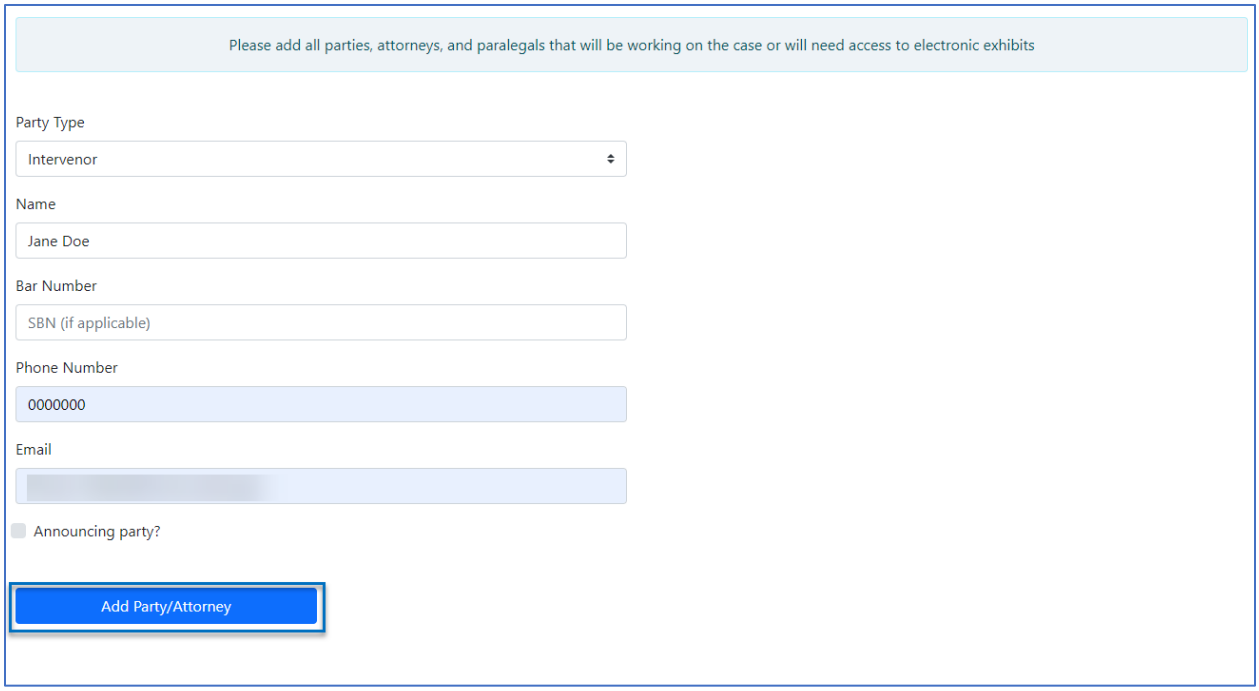


5. From the Announcement Details page, review the announcement details and select *Add New Party and Box Folder* to add additional Box Folders and permissions to an existing exhibit folder or create new *Share Existing Box Folder* to grant access to an existing exhibit folder. The "party type + name" creates folders in BOX automatically, which will be detailed below.



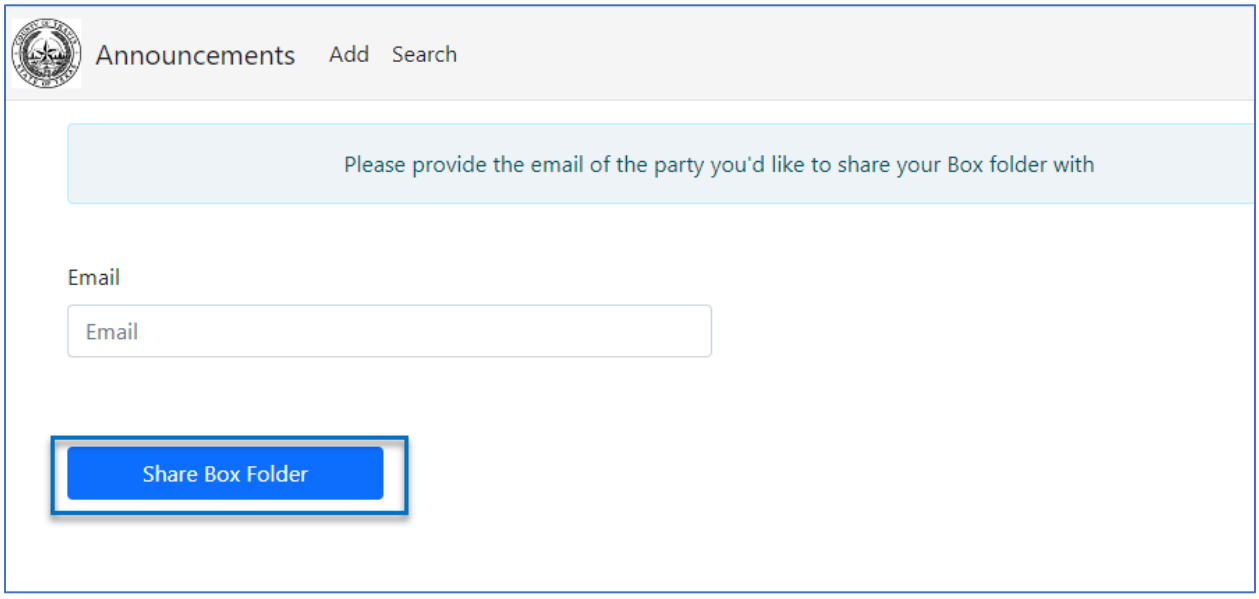
6. From the Add Party page for adding New Party and Box Folder (if your client is missing a folder to upload to), include the party type, name, bar number (if applicable), phone

number, and email address for the party needing access to an exhibit folder and then select *Add Party/Attorney*

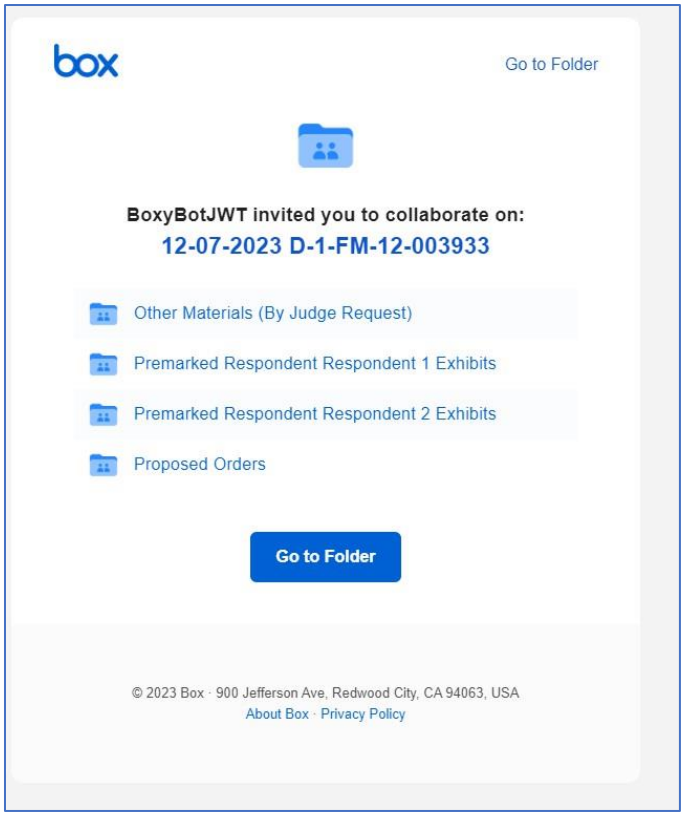


New parties added in this manner will receive their permissions to the BOX exhibit folder immediately.

7. From the Share Existing Box Folder (if you just need to add additional access to existing exhibit folders)

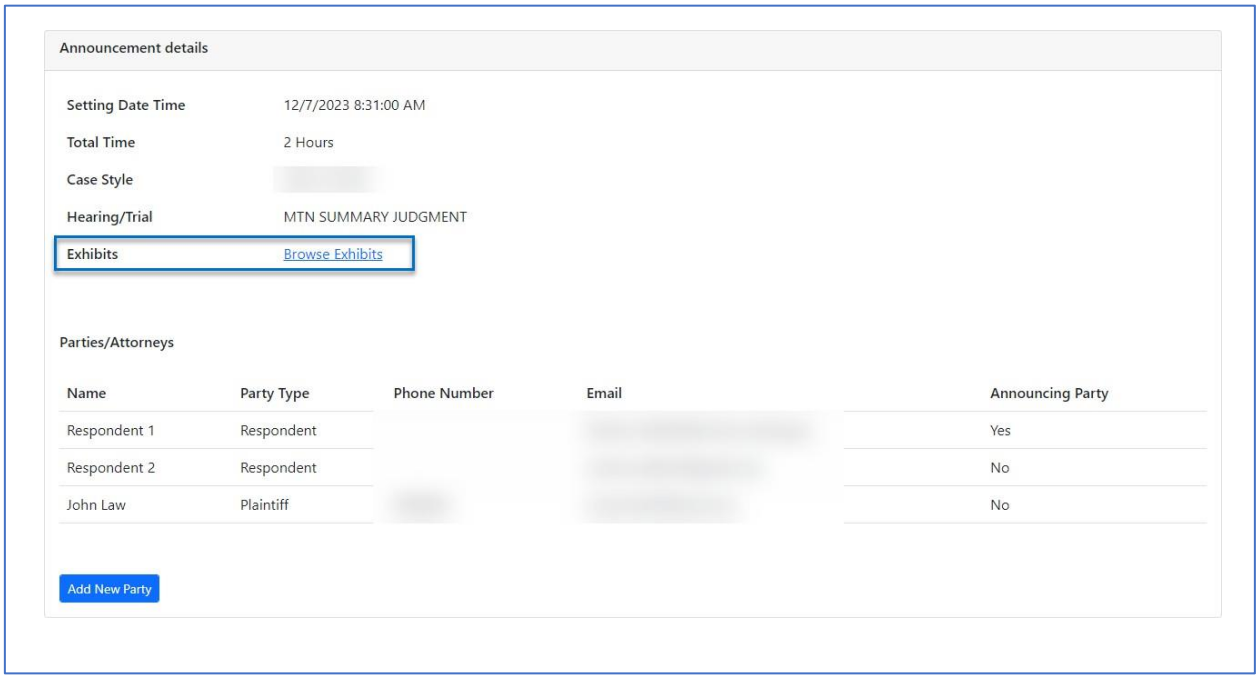


New parties added in this manner will receive their permissions to the BOX exhibit folder immediately.



Each folder created in BOX automatically is associated with the party type and name, so for cases with multiple same party types (respondents for example), there will be folders associated for each respondent "Premarked *Party Name* + *Party Type* Exhibits."

8. From the Announcement Details page, users can also launch directly into the BOX exhibit folder, by selecting *Browse Exhibits*

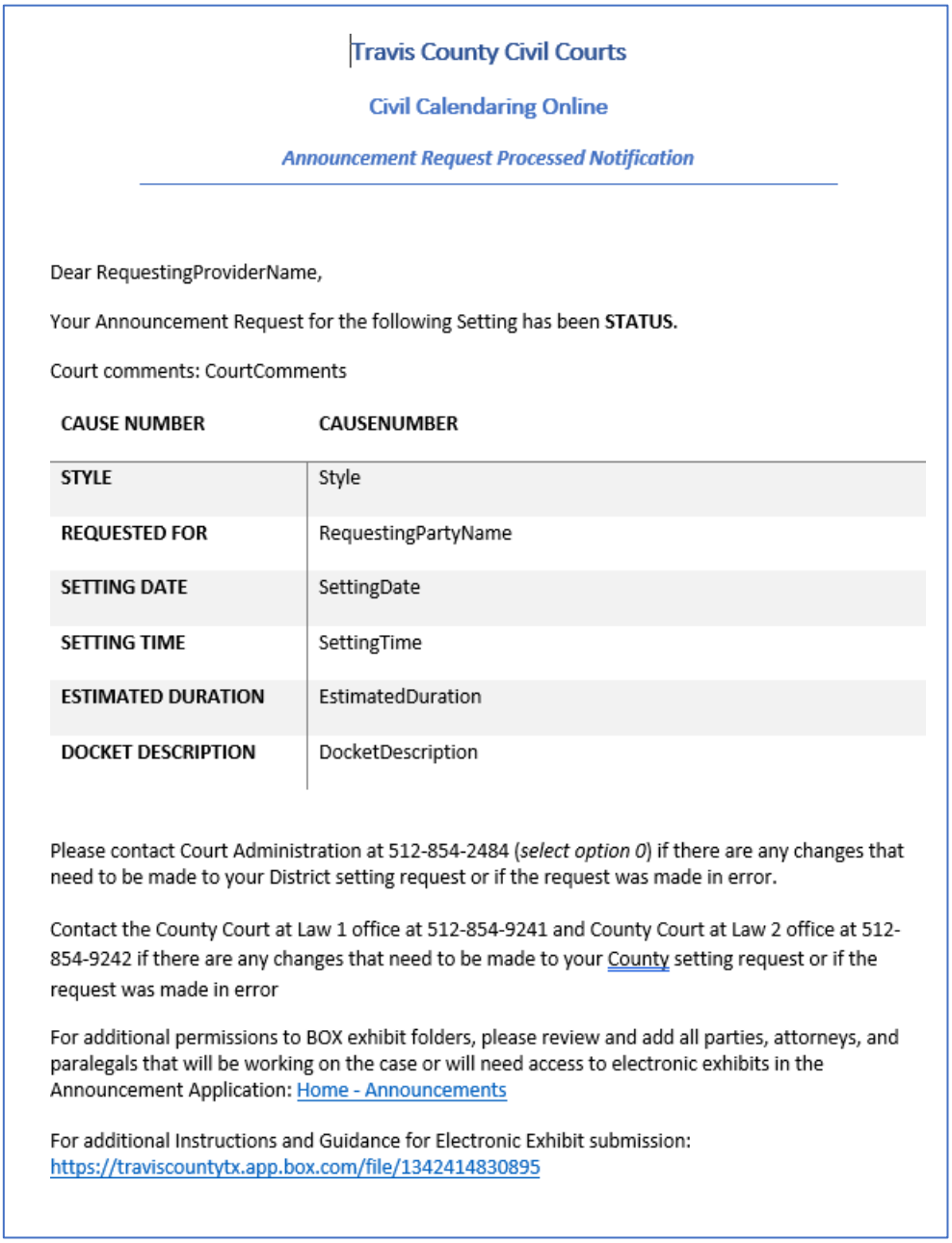


Announcement Acceptance and Rejection Emails

When an announcement has been accepted or rejected by Court Administration, all parties to the case receive an announcement status email. We have modified the verbiage of this notification email to include a link to the new Announcement Application for additional permissions to BOX and a link to an Instructions and Guidance for Electronic Exhibits folder with guidelines to ensure standardization for uploading pre-marked exhibits.

Announcement Application: Home - Announcements

Instructions and Guidance for Electronic Exhibits:
https://traviscountytx.box.com/v/InstructionsElectronicExhibits



Travis County Civil Courts

Civil Calendaring Online

Announcement Request Processed Notification

Dear RequestingProviderName,

Your Announcement Request for the following Setting has been **STATUS.**

Court comments: CourtComments

CAUSE NUMBER	**CAUSENUMBER**
STYLE	Style
REQUESTED FOR	RequestingPartyName
SETTING DATE	SettingDate
SETTING TIME	SettingTime
ESTIMATED DURATION	EstimatedDuration
DOCKET DESCRIPTION	DocketDescription

Please contact Court Administration at 512-854-2484 (*select option 0*) if there are any changes that need to be made to your District setting request or if the request was made in error.

Contact the County Court at Law 1 office at 512-854-9241 and County Court at Law 2 office at 512-854-9242 if there are any changes that need to be made to your County setting request or if the request was made in error

For additional permissions to BOX exhibit folders, please review and add all parties, attorneys, and paralegals that will be working on the case or will need access to electronic exhibits in the Announcement Application: Home - Announcements

For additional Instructions and Guidance for Electronic Exhibit submission: https://traviscountytx.app.box.com/file/1342414830895

BOX Exhibit Folders

Each BOX exhibit folder will be labelled the “Date of Setting + Cause Number” and contain a folder for each party type and party name combination, a Proposed Orders folder, and an Other Materials (By Judge Request) folder. Parties will be given Viewer Uploader permissions to each of the folders contained in the parent setting folder, so that uploading of exhibits, reviewing other party exhibits, downloading files, and replacing exhibits can occur.

Court Administration

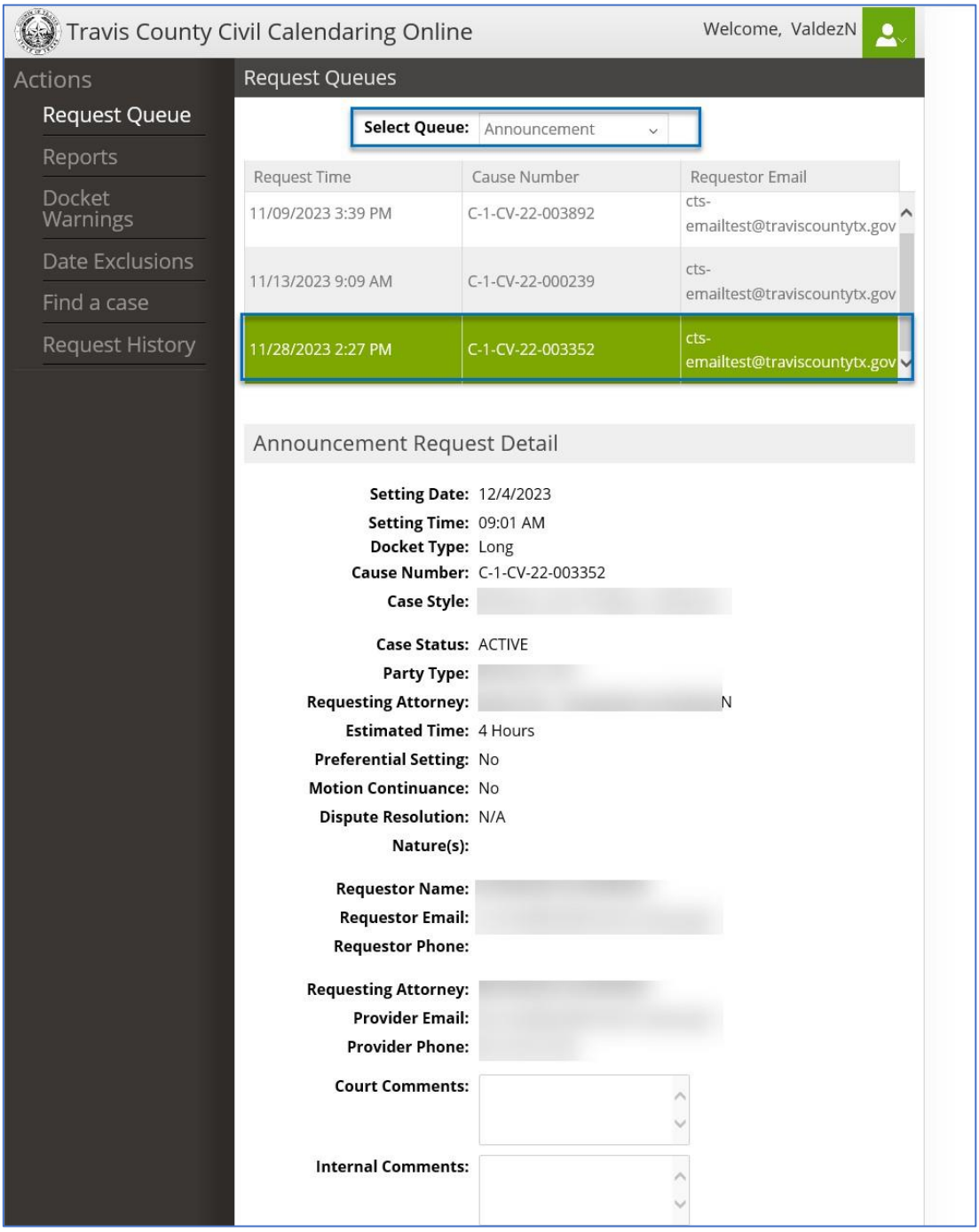
This new announcement workflow will utilize the existing District and County announcement request queues, adding the Announcement Form's digitized additional questions regarding BOX and remote hearings. This will replace the .PDF announcement process for all hearings except Protective Orders, and for all parties except Pro Se Litigants. We have automated a "Remote" Public Comment when processing an announcement with a remote hearing request, and will be utilizing the existing acceptance, rejection, and comment features already built into the CCO acceptance process. A party's access to the exhibit folder in BOX will directly be linked to an acceptance of the announcement request from Court Administration, with multiple announcement requests and announcement amendments not affecting the underlying permissions.

Civil Calendaring Online (CCO) Announcements

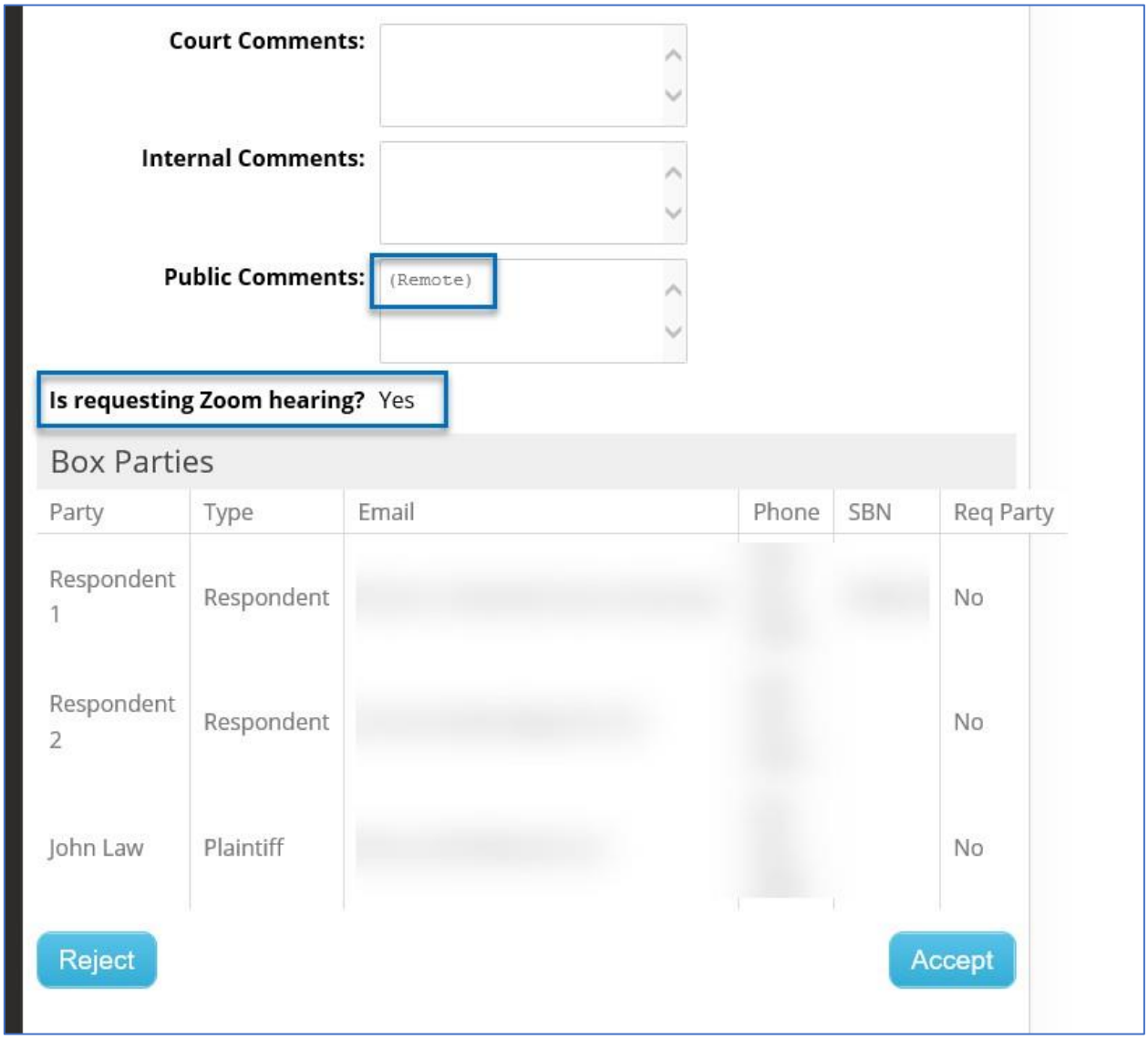
As a Court Administration Judicial Aide, I can now process Announcement forms and BOX Exhibit folder permission requests from CCO and provide auto-notice to all parties from the acceptance of announcements.

1. Open Civil Calendaring Online and login
    a. https://courts.co.travis.tx.us/cco

2. Select *Announcement* from the select queue and then select an Announcement request



3. The announcement details required for validation and authorization will still be displayed on the top portion of the Announcement Request Detail page, but as you move further down you will see the additional remote hearing and BOX permissions details. Every zoom hearing request will default a “(Remote)” Public Comment



4. Once an evaluation of the request has been completed, you can accept or reject the announcement and BOX permission request, add court comments back to the attorney on why there is a rejection (for example), and add additional internal and public comments based on the requests.

5. After accepting, not only will CCO capture the announcement information and duration which is critical for prioritizing our dockets, but it will also automate the creation of a BOX exhibit folder for that cause number and sub-folders for each of the parties identified in the CCO request form.

Pro Se Litigants

For Pro Se Litigant Announcements, those will continue to be captured through the Announcement .PDF and processed by Court Administration supervisors. Future iterations of the Announcement Application will allow for direct submissions of announcements and access to the BOX Exhibit permission features detailed above.

Court Reporters

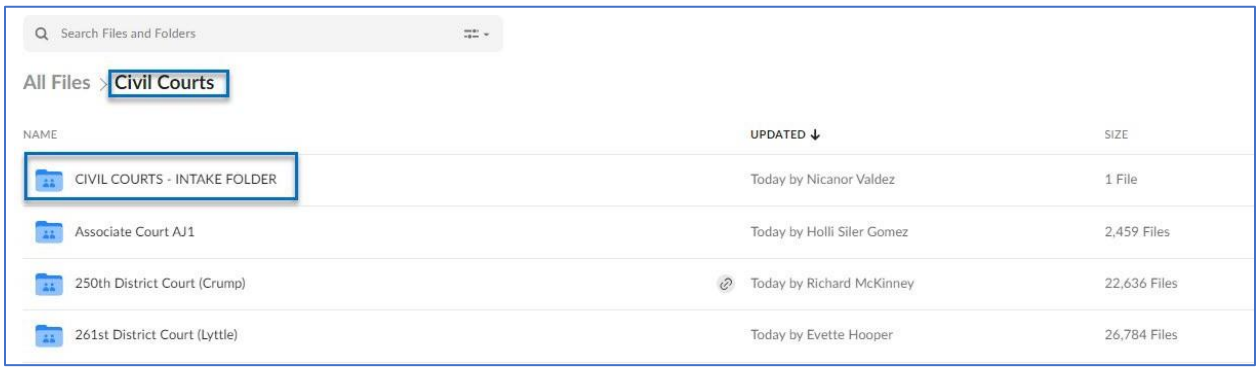
This new announcement workflow will remove the BOX Exhibit Folder creation and permission management tasks for settings (excluding Protective Order settings) and provide immediate access to exhibit folders at the time of the announcement, regardless of the court assigned to the setting. A Civil Courts – Intake Folder has been created in the shared Civil Courts central folder in BOX and a template has been deployed with default auto-generated folders. Prior to a settings court assignment, Attorneys will have been provided Viewer Uploader permissions to the BOX exhibit folders, provided a link to the Instructions and Guidance for Electronic Exhibits documentation in their announcement status emails, and provided access to the Announcement Application for adding additional exhibit folder permissions. After settings have been assigned to individual courts, Court Reporters will **move** over their assignments into their Courts' parent folder and make any modifications required to the standardized folder structure.

BOX Intake Folder

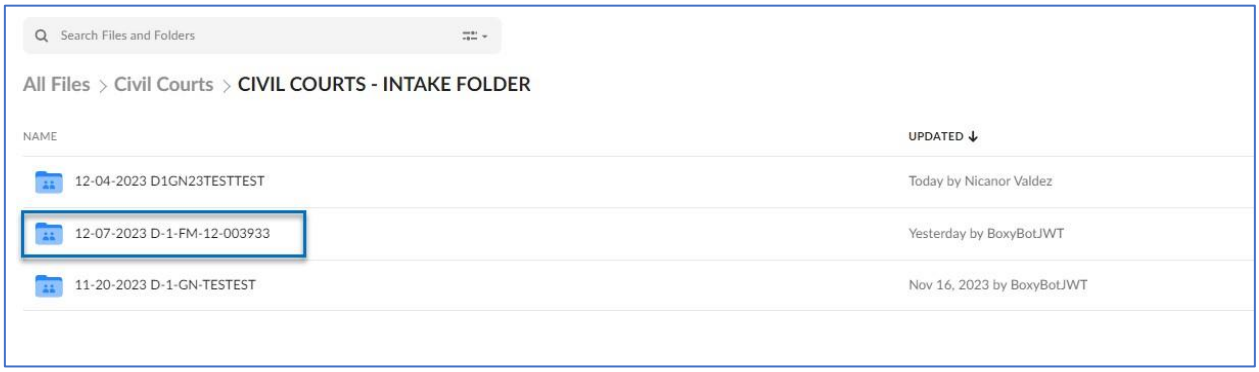
After court assignments have been finalized and a docket report has been published and distributed, Court Reporters will utilize the new BOX folder creation and permission automation to move court assignments from the Civil Courts – Intake Folder into your courts parent folder for each assigned setting.

1. Open BOX and login
    a. BOX

2. Select *Civil Courts* and then select *Civil Courts – Intake Folder*

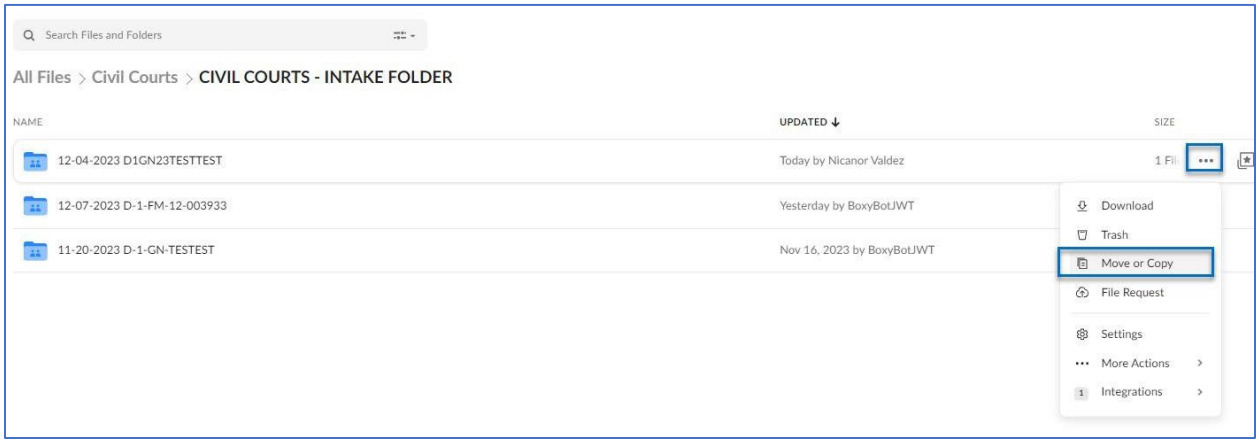


3. Identify your courts' setting assignments by the folder name, each of which, will be labelled the "Date of Setting + Cause Number"

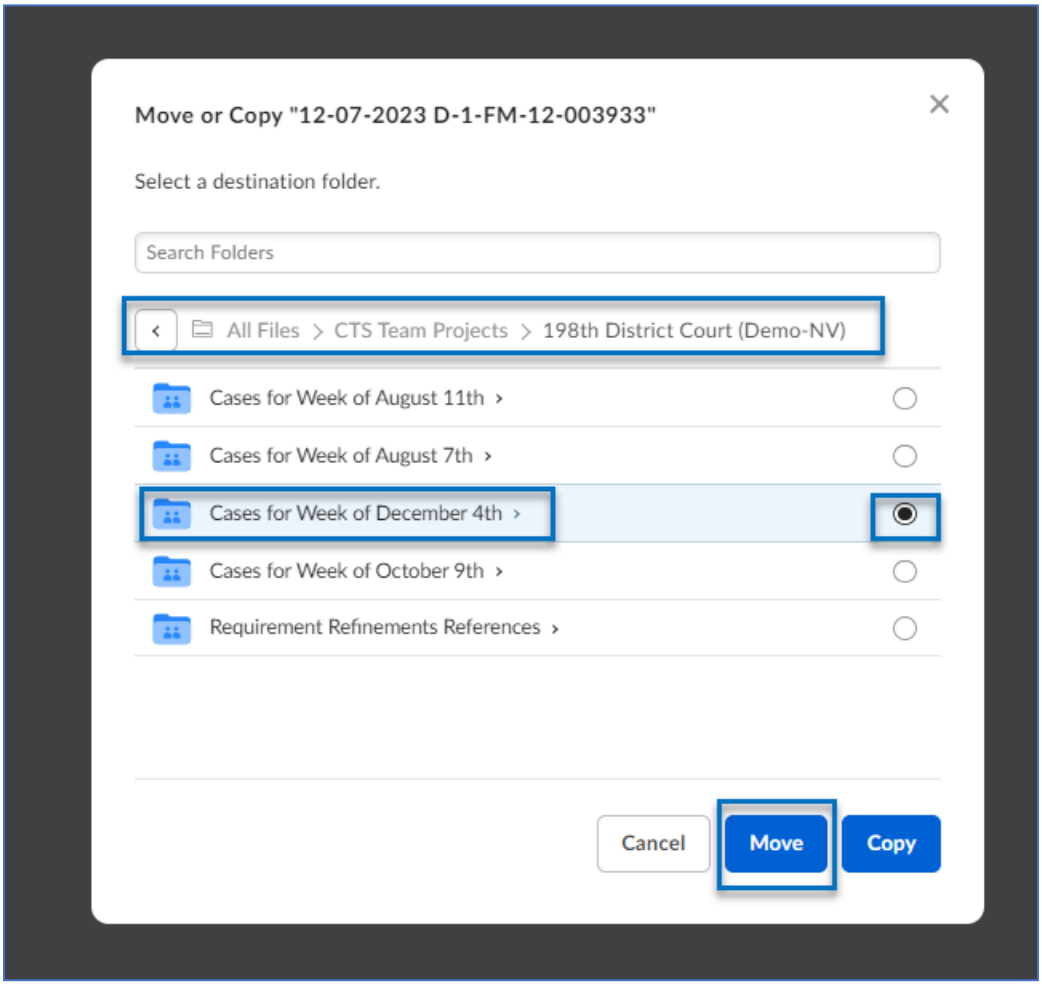


Each Date and Setting folder will contain auto-generated sub-folders for each party's Premarked Exhibits, a Proposed Orders folder, and an Other Materials (By Judge Request) folder. Each folder created in BOX automatically from the announcement form process is associated with the party type and name, so for cases with multiple same party types (respondents for example), there will be folders associated for each respondent "Premarked *Party Name + Party Type* Exhibits."

4. From the Civil Courts – Intake Folder, for a setting assigned to your court, select the *More Options* ellipsis and then the *Move or Copy* option



5. From the Move or Copy pop-up, navigate to your courts parent folder, or the appropriate docket week sub-folder, checkmark the appropriate folder to move, and then select ***MOVE***



NOTE: IT IS CRITICAL THAT YOU SELECT MOVE AND NOT COPY IN ORDER TO MAINTAIN THE SAME PERMISSIONS FOR ATTORNEYS AND LEGAL STAFF

6. The Exhibit folder set for that setting will now be available in your courts folder architecture with all of the same permissions and exhibits collected throughout the process

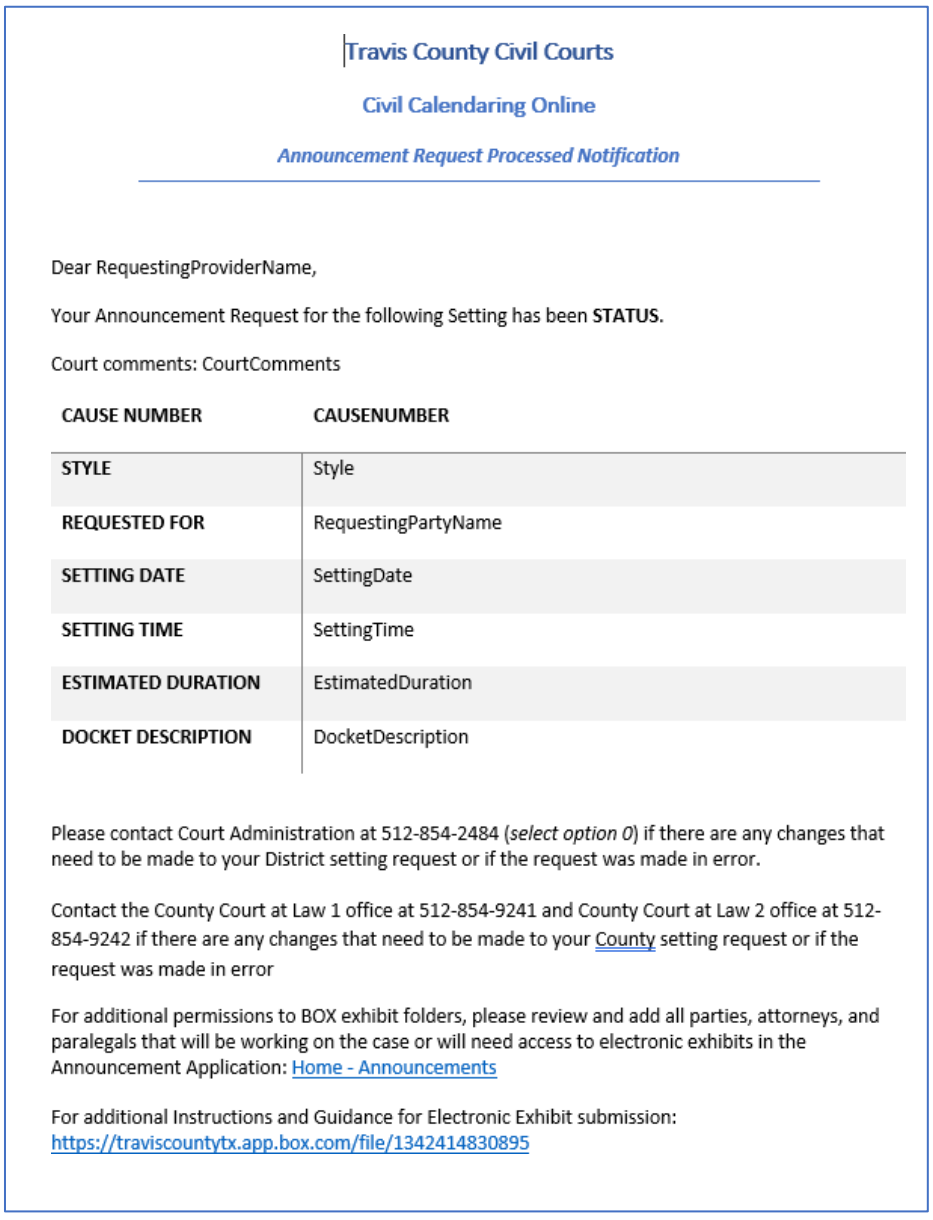
Court Reporters should continue to manage their Admitted Exhibits and post-setting permissions based on each court's requirements and expectations. To meet the varied needs of each court, we have opted not to include a date + cause folder auto-delete feature from the Civil Courts – Intake Folder, so some minimal management of those obsoleted folders may be required.

Instructions and Guidance for Electronic Exhibits

When an announcement has been accepted or rejected by Court Administration, all parties to the case receive an announcement status email. We have modified the verbiage of this notification email to include a link to the new Announcement Application for additional permissions to BOX and a link to an Instructions and Guidance for Electronic Exhibits folder with guidelines to ensure standardization for uploading pre-marked exhibits. This method will allow us to keep those guidelines in a single location and update them whenever necessary.

Announcement Application: Home - Announcements

Instructions and Guidance for Electronic Exhibits:
https://traviscountytx.app.box.com/file/1342414830895



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Court comments: CourtComments

CAUSE NUMBER	**CAUSENUMBER**
STYLE	Style
REQUESTED FOR	RequestingPartyName
SETTING DATE	SettingDate
SETTING TIME	SettingTime
ESTIMATED DURATION	EstimatedDuration
DOCKET DESCRIPTION	DocketDescription

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For additional Instructions and Guidance for Electronic Exhibit submission:
https://traviscountytx.app.box.com/file/1342414830895

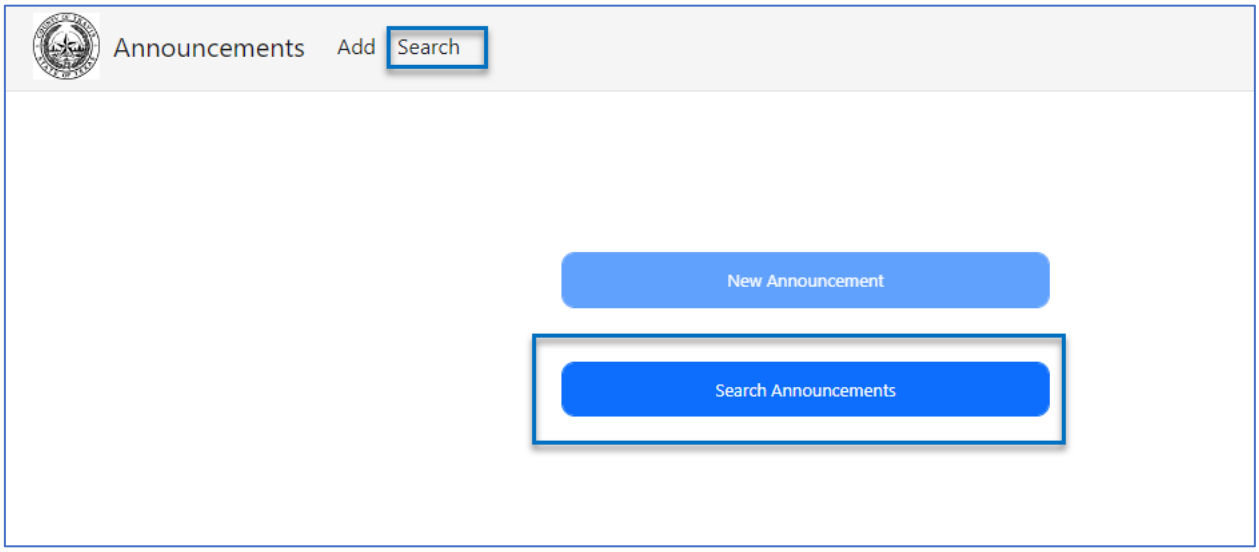
Additional BOX Exhibit Folder Permission Requests

Parties have been provided Viewer Uploader permissions to each of the folders contained in the parent setting folder through this new process, so that uploading of exhibits, reviewing other party exhibits, downloading files, and replacing exhibits can occur. If an attorney requests additional BOX Exhibit Folder permissions for legal staff or co-counsel, direct them to the new Announcement Application so they can manage those permissions on their own:

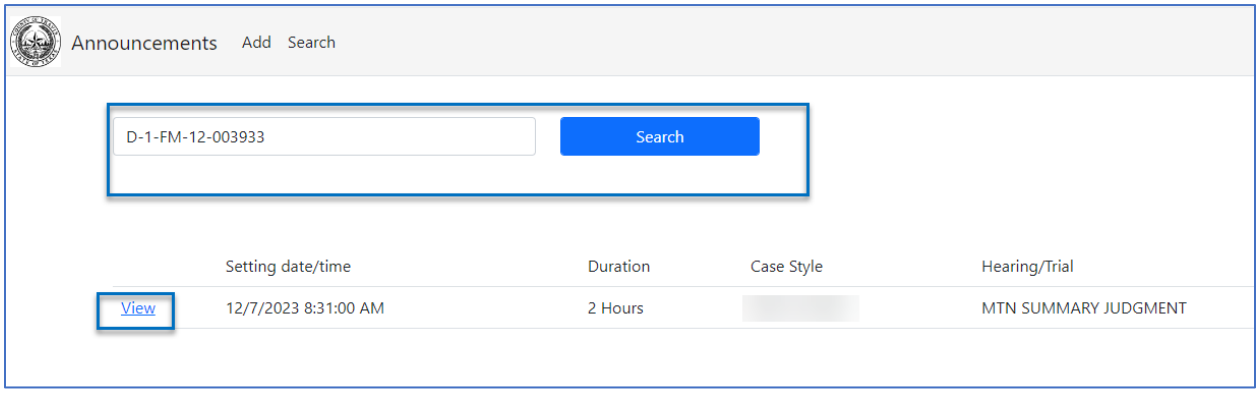
1. Open the Travis County Courts Application Portal
    a. Travis County Courts Applications (traviscourtsapplications.org)

2. Select Announcements *Login*, and login using your existing CCO username and password

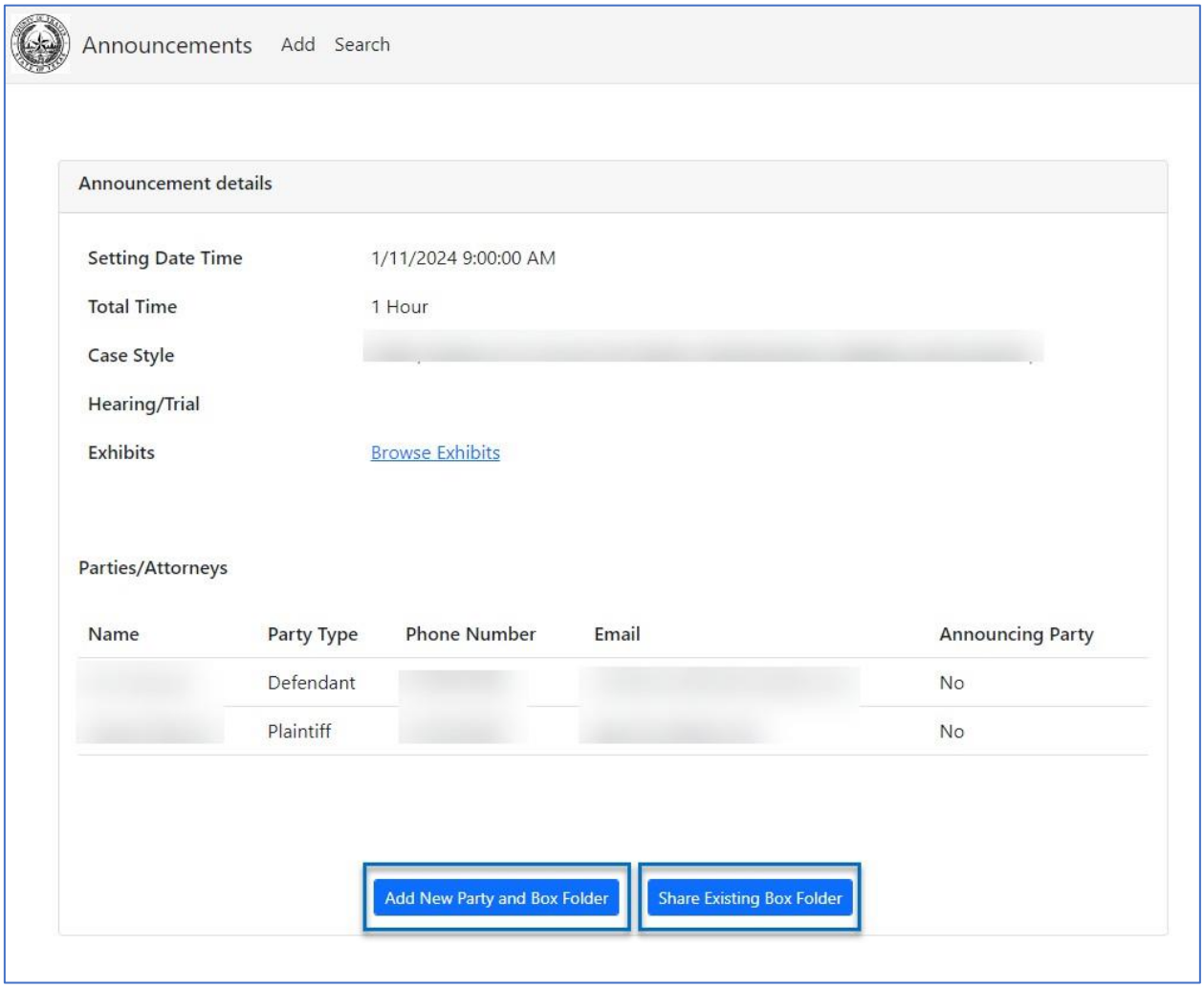
3. From the Announcement Application
    a. Home - Announcements



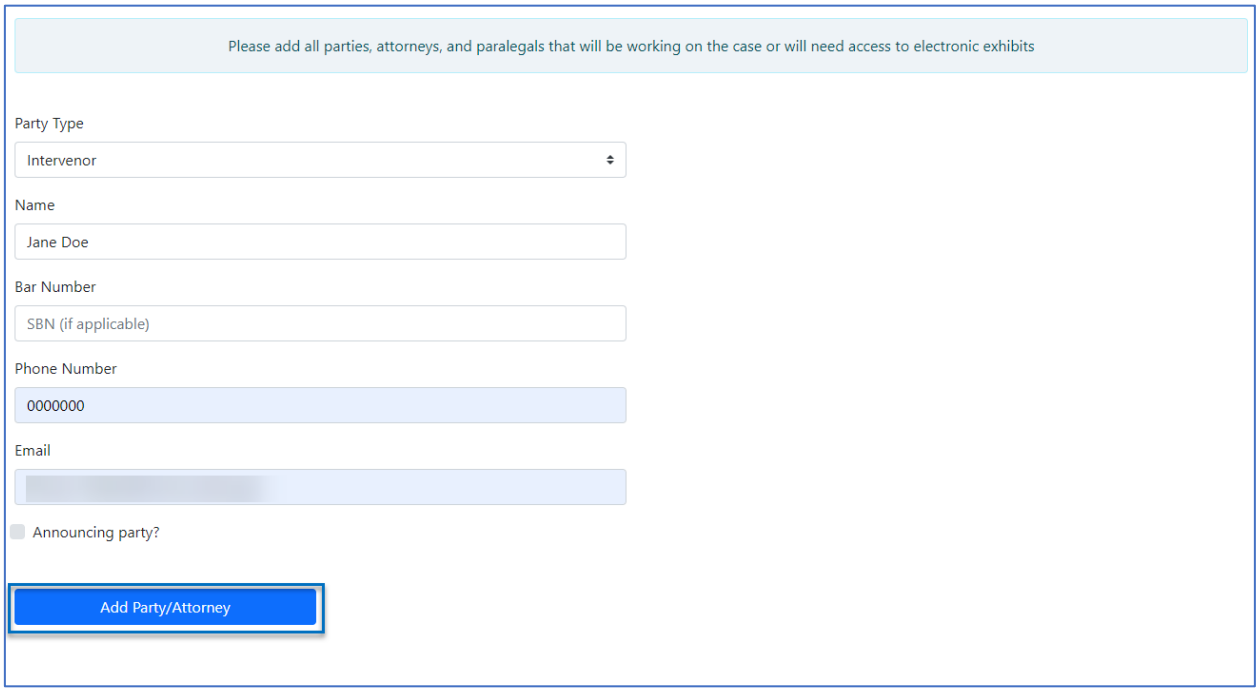
4. Search for the Cause Number for the setting requiring additional BOX exhibit folder permissions, select *Search* and then select *View* for the appropriate setting



5. From the Announcement Details page, review the announcement details and select *Add New Party and Box Folder* to add additional Box Folders and permissions to an existing exhibit folder or create new *Share Existing Box Folder* to grant access to an existing exhibit folder. The “party type + name” creates folders in BOX automatically, which will be detailed below.

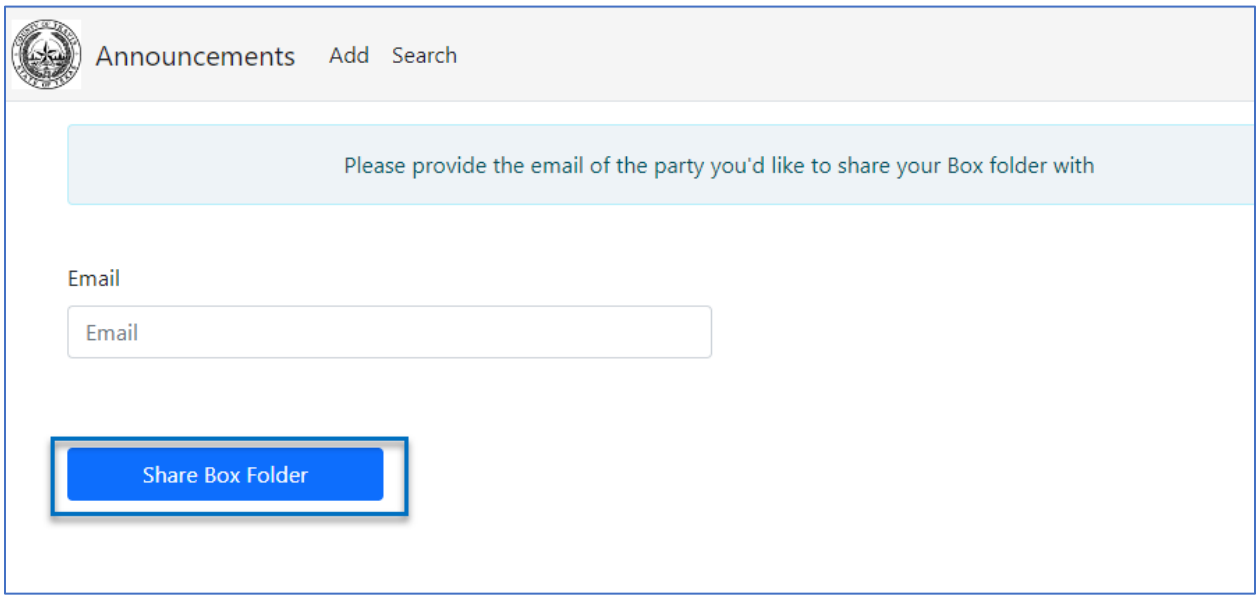


6. From the Add Party page for adding New Party and Box Folder (if your client is missing a folder to upload to), include the party type, name, bar number (if applicable), phone number, and email address for the party needing access to an exhibit folder and then select *Add Party/Attorney*



New parties added in this manner will receive their permissions to the BOX exhibit folder immediately.

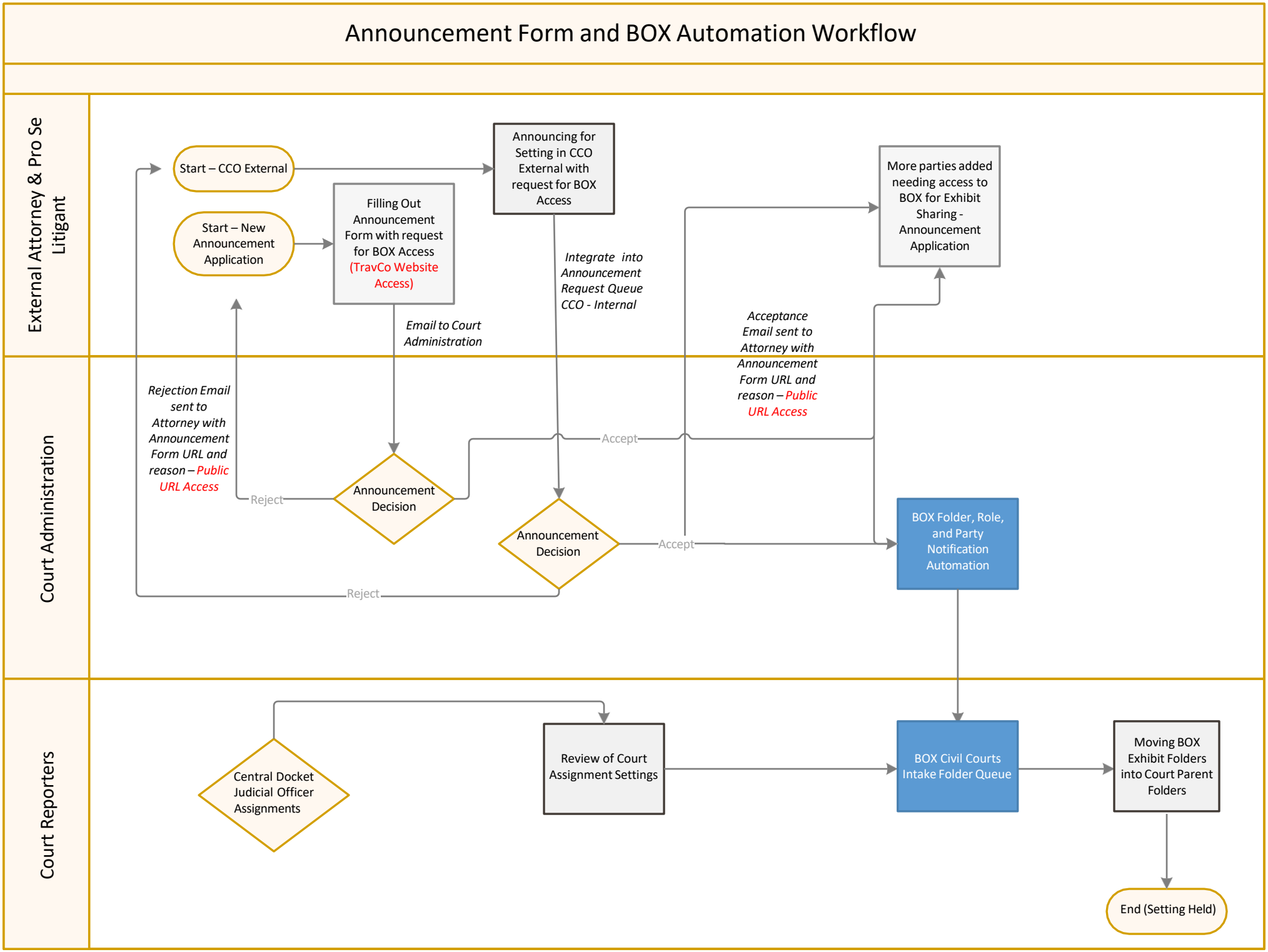
7. From the Share Existing Box Folder (if you just need to add additional access to existing exhibit folders)



New parties added in this manner will receive their permissions to the BOX exhibit folder immediately.

Support

For additional support, technical troubleshooting, or to schedule additional training, contact Courts-Help: Courts-Help@traviscountytx.gov

Announcement Form and BOX Permissions Process Workflow

Announcement Form and BOX Automation Workflow