

# 2020 County and District Clerks' Association of Texas Winter Education Conference

Feb. 3-6, 2020

Embassy Suites by Hilton Hotel Conference Center & Spa, San Marcos



Sunday, February 2		
Time	Event/Session & Presenters	Location
5:30 p.m.	CDCAT Executive Board Meeting	San Marcos River A
Monday, February 3		
Time	Event/Session & Presenters	Location
10 a.m.-5 p.m.	Registration and Information Desk Open	
10:30 a.m.-noon	CDCAT Full Board Meeting	San Marcos River A
<p><b>1:30—3:30 p.m. Clerk User Group Meeting – Clerk Networking by Case Management System (CMS)</b>  Attendees will divide into groups based on their individual CMS interests. Join your fellow clerks for an interactive discussion of topics specific to each CMS system. A panel of seasoned clerks who use each CMS system will share their knowledge and experiences, and they will answer questions. The session topics are listed below:</p>		
	<p><b>Tyler Technologies/Odyssey (87 attendees)</b>  Moderator: Hon. Sheri Woodfin, Tom Green District Clerk</p>	Veramendi Ballroom AB
	<p><b>Local Government Solutions (LGS) (41 attendees)</b>  Moderator: Hon. Karren Winter, Archer County Clerk  Hon. Michelle Pitcox, McCulloch District Clerk</p>	Veramendi Ballroom GH
	<p><b>NET Data (29 attendees)</b>  Moderator: Hon. June Clifton, Nacogdoches County Clerk  Hon. Loretta Cammack, Nacogdoches District Clerk  Mr. Dave Graves, NetData</p>	Veramendi Ballroom C
	<p><b>iDocket (14 attendees)</b>  Moderator: Hon. Linda Holman, Colorado County District Clerk  Hon. May Ann Gonzalez, Schleicher County Combination Clerk</p>	Veramendi Ballroom I
	<p><b>Edoc Technologies (19 attendees)</b>  Moderator: Hon. Judy Crawford, Crane County Combination Clerk  Hon. Beth Rothermel, Washington County Clerk  Hon. Tammy Brauner, Washington County District Clerk</p>	Veramendi Ballroom J
	<p><b>General Session for County Specific, Minimal or No CMS (23 attendees)</b>  Moderator for Introductions—Hon. Tammy Kneuper, Bandera County District Clerk</p>	San Marcos River B
	<p><b>1:30-2:30 p.m.—Electronic Solutions—Using e-File Texas</b>  Mr. Terry Derrick, Program Director, eFile Texas  Mr. Christopher Ricci, Senior Client Success Account Manager, eSolutions</p>	
	<p><b>2:30-3:30 p.m.—Electronic Solutions—Moving Your Courts to Paperless</b>  Ms. Tracy Hopper, Harris County Assistant Director for IT</p>	
3:45-5 p.m.	<p><b>General Session: Legislative Fee Changes and OCA Updates</b>  Ms. Margie Johnson, Assistant General Counsel, Office of Court Administration  Ms. Megan LaVoie, Director of Public Affairs/Special Counsel, Office of Court Administration</p>	Veramendi Ballroom EF
<b>Committee Meetings</b>		
5–6:30 p.m.	By-Laws Committee Meeting	San Marcos River A
	Legislative Committee Meeting	
	Education Committee Meeting	
	Banking and Finance Committee Meeting	
	Community Outreach Meeting	
6–10 p.m.	<p><b>Offsite Event: Gruene River Grill Restaurant Sponsored by: Kofile Technologies, Inc.</b>  Food, drinks, entertainment and door prizes. Transportation provided from Embassy Suites Hotel lobby.</p>	Gruene River Grille Restaurant

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Tuesday, February 4		
Time	Event/Session & Presenters	Location
7:30–8 a.m.	<b>Exhibit Hall open, coffee served</b> <i>Sponsored by: Certified Payments</i>	Spring Lake ABC
8 a.m.–5 p.m.	<b>Registration and Information Desk open</b>	
8 a.m.–5 p.m.	<b>Silent Auction</b>	Chautauqua AB
8 a.m.–5 p.m.	<b>Resistance Response Simulator</b> <i>Provided by: Texas Association of Counties</i>	Veramendi D
<b>Welcome General Session</b>		
<i>Moderator: Hon. Hon. Laura Hinojosa, Hidalgo County District Clerk, CDCAT President</i>		
8–8:30 a.m.	<b>Welcome and Vendor Appreciation</b> <b>Presentation of Colors—Hays County Color Guard</b> <b>Invocation— Hon. J.C. Perez, Jim Wells County Clerk</b> <b>National Anthem—Singing Clerks</b> <b>Pledge of Allegiance/Texas Pledge—Hon. Ruben Becerra, Hays County Judge</b>	
8:30–9 a.m.	<b>Deeply Rooted in History: A Look at the Creation of the Office of the Clerk</b> <i>Hon. Laura Hinojosa, Hidalgo County District Clerk</i> <i>Hon. Sheri Woodfin, Tom Green County District Clerk</i> As the Association celebrates its 125th Anniversary, we take a walk down memory lane and explain the history of the Office of the Clerk throughout the ages.	Veramendi Ballroom EF
9–10 a.m.	<b>Bureau of Vital Statistics: Adoptions</b> <i>Ms. Leslie Olmos, Field Services Representative, Bureau of Vital Statistics, Texas Health and Human Services</i> The session will give an overview on the adoption process from a vital statistics point of view. Presenter will go over how to fill out the Certificate of Adoption and tips for families, attorneys and district clerks. Scenarios will also be used to better comprehend the process. All forms related to adoption will be reviewed collectively, and lastly, a Q & A session to end the training.	
10–10:30 a.m.	<b>Refreshment break with vendors</b> <i>Sponsored by: Kofile Technologies, Inc.</i>	Spring Lake ABC
10:30 a.m.–noon	<b>Cybersecu"root"y</b> <i>Mr. Jonathan Turner, IT Services Manager, Information Technology, Texas Association of Counties</i> Presenter will address the current cybersecurity threat landscape and everyday best practices for risk mitigation.	Veramendi Ballroom EF
Noon–1:30 p.m.	<b>Lunch on your own</b>	
1:30–3 p.m.	<b>Keynote: Be Happy, Work Happy. Because Happy People Make Good Things Happen</b> <i>Ms. Kim Hodous, The Happiness Speaker</i> Happiness is not an elusive goal to strive for. Happiness is already in you and ready to emerge! In this inspiring and hands-on session, Kim shares astounding research and proven science-backed habits that will increase your emotional well-being and sense of fulfillment while leading you to living an all-out happy life!	Veramendi Ballroom EF
3–3:30 p.m.	<b>Refreshment break with vendors</b> <i>Sponsored by: US Imaging</i>	Spring Lake ABC
3:30–4:30 p.m.	<b>Criminal Justice Information Services (CJIS) and National Instant Criminal Background Check System (NICS) — Reporting for Mental Assessments</b> <i>Mr. Craig Lopez, CJIS Auditor III, Texas Department of Public Safety (DPS)</i> The presentation will include a CJIS overview, CJIS site, reporting tips, NICS reporting and CJIS conference information	Veramendi Ballroom EF
4:30–5 p.m.	<b>Deeply Rooted in History: A Look at the Creation of CDCAT</b> <i>Hon. Laura Hinojosa, Hidalgo County District Clerk</i> <i>Hon. Sheri Woodfin, Tom Green County District Clerk</i> This presentation will also focus on the creation of the Association and the rich history that we share as county and district clerks in Texas.	Veramendi Ballroom EF
5–7:30 p.m.	<b>Happy Hour/Scholarship Fundraiser</b> <i>Sponsored by: Data Preservation Solutions</i>	Hotel Atrium

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## Wednesday, February 5

Time	Event/Session & Presenters	Location	
7:30–8:30 a.m.	Exhibit Hall Open, coffee served <i>Sponsored by:</i>	Spring Lake ABC	
8 a.m.–5 p.m.	Registration and Information Desk open		
8 a.m.–3:30 p.m.	Silent Auction	Chautauqua AB	
8 a.m.–3:30 p.m.	Resistance Response Simulator <i>Provided by: Texas Association of Counties</i>	Veramendi D	
<b>Deeply Rooted in Education (Breakout Sessions)</b>			
	<b>BREAKOUT 1: CIVIL RELATED TO CRIMINAL</b> <b>Veramendi ABC</b> <i>Mod—Hon. Linda Holman, Colorado Co. District Clerk</i>	<b>BREAKOUT 2: CRIMINAL</b> <b>Veramendi Ballroom EF</b> <i>Mod—Hon. Lori Bohannon, Wichita County Clerk</i>	<b>BREAKOUT 3: MISCELLANEOUS</b> <b>Veramendi Ballroom GHI</b> <i>Mod—Hon. Julie Smith, Potter County Clerk</i>
8:30–9:15 a.m.	<b>Collections</b> <i>Mr. Jim Lehman, Co-CEO, Coalition of American Court Collectors</i> This session will provide an overview of the Collection Improvement Program, including a brief history, critical components, key requirements and program impact.	<b>HR 101: What Does A Supervisor Need to Know About Employees and HR?</b> <i>Ms. Diana Cecil, SPHR, SHRM-SCP, Senior Human Resources Consultant, Texas Association of Counties</i> This session will cover several hot topics to assist supervisors with employee issues. We will cover a variety of issues including hiring, job descriptions, leave issues, discipline and documentation and terminations.	<b>Archive Plan and Requirements</b> <i>Hon. Patti L. Henry, Chambers County District Clerk</i> <i>Hon. Donece Gregory, Tyler County Clerk</i> Presenters will discuss the reason behind the creation of the archive plan, implementation process of the plan and the fee, and the collection method.
9:15–10 a.m.	<b>Collections (repeat session)</b> <i>Mr. Jim Lehman, Co-CEO, Coalition of American Court Collectors</i> This session will provide an overview of the Collection Improvement Program, including a brief history, critical components, key requirements and program impact.		<b>Protecting and Preserving Historical Roots: Don't just think outside the box ... SHRED the box!</b> <i>Hon. Clarissa Webster, Ector County District Clerk</i> One county's successful example of how clerks benefited from collaborating with multiple local departments, utilizing designated funding, contracting with outside vendors, integrating archival records into current case management systems, and implementing available technology and digital resources.
10–10:30 a.m.	<b>Refreshment break with vendors</b> Exhibit Hall <i>Sponsored by: Local Government Solutions</i>		
10:30–11:30 a.m.	<b>Committee Reports</b> <i>Hon. Sharena Gilliland, Parker County District Clerk</i> <i>Hon. Jon Gimble, McLennan County District Clerk</i> <i>Hon. Sheri Woodfin, Tom Green County District Clerk</i> Presenters report on the Texas Judicial Committee, Supreme Court Rules Advisory Committee and the Judicial Committee on Information Technology.	<b>HR Forms: Document, Document, Document</b> <i>Hon. Lynne Finley, Collin County District Clerk</i>	<b>Open Records</b> <i>Ms. Tamara Smith, Assistant Attorney General, Office of the Attorney General</i> This session will cover the charges for providing information pursuant the Public Information Act.
11:30 a.m.–1 p.m.	<b>Lunch on your own</b>		
1–1:45 p.m.	<i>Mod.— Hon. Clarissa Webster, Ector County District Clerk</i> <b>Escheating From A Clerk's Perspective</b> <i>Hon. Sheri Woodfin, Tom Green County District Clerk</i> This session will discuss registry of the court and escheating funds by the clerk.	<b>Session Room Change: San Marcos River AB</b> <i>Mod.—Hon. Judy Crawford, Crane County Combo Clerk</i> <b>Dig Deep: Internal Audits and Quality Control Processes</b> <i>Ms. Lindsey Klein, Tax Auditor, Texas Comptroller of Public Accounts</i> Session will review how to prepare for a Texas Comptroller's local revenue audit on criminal and civil fees.	<i>Mod.— Hon. Brenda McKanna, Moore County Clerk</i> <b>Marks and Brands</b> <i>Mr. Bryan Yates, SR Software Systems Analyst, Collin County</i> <i>Mr. Scott Williamson, Executive Director, Law Enforcement, Brand and Inspection Services, Texas and Southwestern Cattle Raisers Association</i> This session will be a discussion on preparing for the 2021 brand registration, new technology and electronic options.
1:45–2:30 p.m.	<b>Non-Criminal Surety and Cash Bonds</b> <i>Hon. John Warren, Dallas County Clerk</i> Presentation will discuss the bond process and what the law requires. It will also provide best practices to ensure the processes being used are effective.	<b>Dig Deep: Internal Audits and Quality Control Processes (repeat session)</b> <i>Ms. Lindsey Klein, Tax Auditor, Texas Comptroller of Public Accounts</i> Session will review how to prepare for a Texas Comptroller's local revenue audit on criminal and civil fees.	<b>Official Public Records</b> <i>Hon. Nancy Rister, Williamson County Clerk</i> Presentation will be a basic review of Official Public Records recording laws plus the weird things that come up, duties as a recorder, searches, fees, indexing, fraudulent filings, redaction, voiding, electronic filing, plats, DBAs and recording certified copies.
2:30–3 p.m.	<b>Refreshment break with vendors (silent auction ends during break)</b> Exhibit Hall <i>Sponsored by: US Imaging</i>		
3–4 p.m.	<b>Mandatory Reporting to the Office of Court Administration</b> <i>Ms. Sandra Mabbett, Judicial Information Analyst, Office of Court Administration</i> Overview of the Monthly Court Activity Report and the Appointments and Fees Reports.	<b>Court Reporter Exhibits (Receiving, Cataloguing, Dispose)</b> <i>Ms. Paula Frederick, Official Court Reporter, 85<sup>th</sup> District Court</i> This Q&A session will present information on court reporter exhibits from an official court reporter's point of view.	<b>Marriage License</b> <i>Hon. Lori Bohannon, Wichita County Clerk</i> <i>Hon. Stacey Kemp, Collin County Clerk</i> Presenters will cover the basics of properly issuing and recording formal and informal marriage licenses.
4–5 p.m.	<b>Panel: District Clerks ListServ Live</b> <i>Hon. Tammy Robinson, Taylor County District Clerk</i> <i>Hon. Clarissa Webster, Ector County District Clerk</i> <i>Hon. Sheri Woodfin, Tom Green County District Clerk</i>	<b>Panel: Combo Clerks ListServ Live</b> <i>Hon. Judy Crawford, Crane County Combo Clerk</i> <i>Hon. Lisa Johnson, Hemphill County Combo Clerk</i> <i>Hon. Melissa Mead, Hartley County Combo Clerk</i>	<b>Panel: County Clerks ListServ Live</b> <i>Hon. Sherry Dowd, Navarro County Clerk</i> <i>Hon. Sasha Keltan, Clay County Clerk</i> <i>Hon. Brenda McKanna, Moore County Clerk</i>
6:30–9 p.m.	<b>125<sup>th</sup> Anniversary Celebration (Formal attire requested)</b> <i>Entertainment: Mr. Terry Mikeska, Pianist</i>		Veramendi Ballroom EF



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Thursday, February 6

## General Session

Time	Event/Session & Presenters	Location
7:30–8:30 a.m.	<b>Coffee</b> <i>Sponsored by: Texas Association of Counties</i>	Veramendi Ballroom EF Foyer
	<b>Closing General Session</b> <i>Moderator: Hon. Stacey Kemp, Collin County Clerk, CDCAT Vice President</i>	
8:30–9 a.m.	<b>Lifetime Protective Orders—House Bill 1343: Clerk Procedures and Processes</b> <i>Hon. Lisa David, Williamson County District Clerk</i> An in-depth look at House Bill 1343 and the processes and procedures related to the bill.	Veramendi Ballroom EF
9–10 a.m.	<b>Court of Criminal Appeals/re:Search and Misc. Court Orders</b> <i>Ms. Holly Taylor, Staff Attorney, Texas Court of Criminal Appeals</i> This session will explore Court of Criminal Appeals decisions over the last few years that impact county and district clerks. She will also discuss Court of Criminal Appeals' miscellaneous orders impacting clerks. In addition, the session will include an update on E-filing and re:SearchTX decisions and developments.	
10–11:30 a.m.	<b>National Security Background Investigations/Courts</b> <i>Mr. David J. Hicks, Chief-Law Enforcement Liaison Office, Defense Counterintelligence and Security Agency</i> Hicks will be briefing on the National Security Background Investigation program as it relates to the cooperation and working relationships with the court system.  The Defense Counterintelligence and Security Agency is responsible for conducting over 2 million background investigations each year. A vital part of their ability to deliver efficient and effective background investigations to safeguard the integrity and trustworthiness of the Federal workforce is obtaining Criminal History Record Information (CHRI) from state and local criminal justice agencies.	

Conference Adjourns—Deeply Rooted in History