



Transformative Business Access: ELUHO Revolutionizes Case Management System

Digital Services: Government to Business

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EXECUTIVE SUMMARY

The purpose of this project was to modernize the Environmental & Land Use Hearings Office's (ELUHO) legacy system for case management, ensuring easy, accurate, and timely access to decisions made by the Growth Management Hearings Board (GMHB), Pollution Control Hearings Board (PCHB), and Shorelines Hearings Board (SHB).

For over 13 years, ELUHO relied on a custom-built legacy software system. As the system aged and technology advanced, it became increasingly difficult to meet the agency's business needs. In October 2019, ELUHO conducted a feasibility study, which recommended replacing the existing platform.

In August 2022, ELUHO selected Salesforce as the platform for its new Case Management System (CMS) and partnered with Eightcloud for its implementation. From August 2022 to June 2023, Eightcloud and ELUHO collaborated to design, build, and deploy the new CMS, which went live on June 16, 2023. The new online system provides free access to legal information on both historical and active cases.

The new CMS has significantly increased ELUHO's efficiency by updating data management processes and workflows. With the new system, attorneys and the public can file cases online from anywhere with an internet connection. Users can also access previous cases dating back to 1991. These improvements not only make government records readily available but also make it easier for staff to track cases, documents, and hearings, enhancing the overall efficiency of the process.

IDEA

The Environmental & Land Use Hearings Office (ELUHO) is a small agency with fewer than 20 employees, including eight Governor-appointed Board members. ELUHO provides administrative and legal support to three boards: the Growth Management Hearings Board (GMHB), the Pollution Control Hearings Board (PCHB), and the Shorelines Hearings Board (SHB). These boards review environmental and land use decisions made by state agencies, local governments, and other entities.

At any given time, ELUHO handles nearly 120 active cases. Many cases involve multiple parties, often with more than one attorney per party, and can last several years, generating tens of thousands of pages of documents. Hearings, which resemble trials, can span from a few days to several weeks.

Previously, the public had to file multiple copies of written documents for appeals. Finding board decisions or case information was challenging. Since the 1990's, ELUHO had used a custom-built legacy database to manage legal case data, which had limited functionality and required numerous workarounds. This database, initially based on a paper filing system, became email-based with the

Vision

Making environmental and land use Board cases transparent, accessible, and easy to track. Improving workflows and communication by centralizing case documents, automating processes, and performing case-related tasks in one place.



onset of the pandemic. The paper process was slow and tedious, while the email process, started in 2020, was difficult to manage due to lost email attachments and issues with saving them to the case file. Only board orders (decisions) were posted online, and their searchability was limited and confusing.

A 2019 feasibility study recommended a new software platform, leading to the ELUHO CMS Modernization Project. The project aimed to:

1. Implement a new case management system using Salesforce and SharePoint to enable online filing, easy queries, and access to Board orders, case documents, and case information.
2. Eliminate redundant work functions, increase efficiency, and boost staff productivity.

This project is pioneering in its integration of advanced functionalities, making it a trailblazer in the state and setting a new standard for similar systems nationwide. While some courts use electronic filing systems, they lack the extensive accessibility to case information and documents that ELUHO's new CMS system provides. ELUHO estimates that this is the first system in the nation to offer such a high level of features. Other state quasi-judicial agencies and some courts do have electronic filing, but they do not include the comprehensive accessibility and internal case management features that this system boasts.

This project addresses several state and national mandates including:

- **[NASCIO State CIO Top Ten Priorities](#)** – Digital Government/Digital Services, Legacy Modernization, Cloud Services, Data and Information Management, and Customer Relationship Management.
- **[Washington State Enterprise IT Strategic Plan:](#)**
 - **Goal #1: Create a Government Experience that Leaves No Community Behind** – Through a connected government that emphasizes service delivery and the experience of those we serve, we can achieve equitable outcomes across our communities.
 - **Goal #2 – Better Data, Better Decisions, Better Government, Better Washington** – Use data and insights to improve the experience of those we serve, prioritize service improvements, drive strategic decisions, and improve transparency.
 - **Goal #3: Innovative Technology Solutions Create a Better Washington** – Prioritize solutions emphasizing access, technology, and innovation to address systemic societal challenges and align our decision-making for those we serve.

IMPLEMENTATION

GOAL: Replace the existing database system with a modern Case Management System (CMS) that will support the entire ELUHO business.



Project Summary

Replacement of ELUHO’s website and legacy database were the primary components of the project. The project replaced ELUHO’s previous database with a modern Case Management System (CMS) built in Salesforce that supports the entire ELUHO business—each of the three Boards in addition to ELUHO’s administrative and legal support functions.

The CMS project began in April 2019 and the roadmap included four distinct chapters:

1. Feasibility (2019)
2. Funding (2020 – 2021)
3. Implementation Take 1 (2021-2022)
4. Implementation Take 2 (2022-2023)

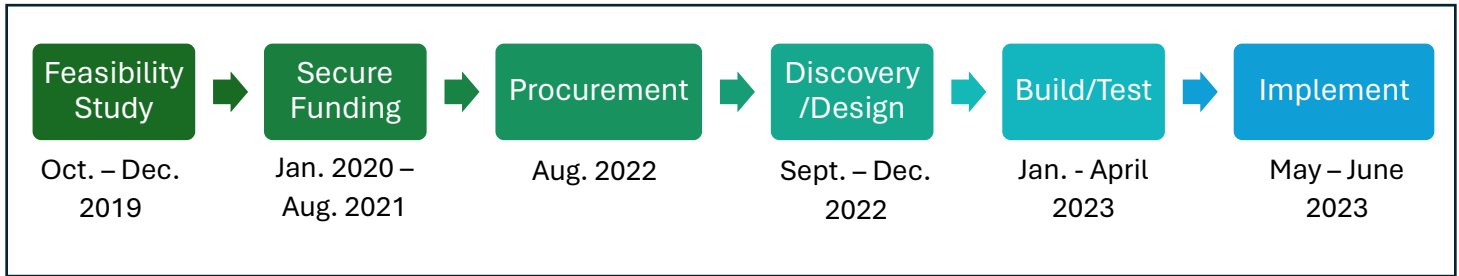
Highlighting the Involvement of Multiple Partners

The success of this project was driven by the collaboration of various partners. The Executive Steering Committee, composed of the ELUHO Director, key Board Members, ELUHO SMEs, QA consultants, the Project Manager, a senior consultant from the Office of the Chief Information Officer (OCIO), and representatives from Washington Technology Solutions (WaTech), championed the project. They allocated resources, provided guidance to the project team, and made informed decisions as required.

The vendor team included:

- AvachaTech as project manager
- Integrated Solutions Group for QA
- Zemek and Associates for Communications
- Eightcloud/Navisite for design, build, and implementation

A transparent and adaptable relationship developed between the agency and the vendor team at Eightcloud, fostering mutual trust and collaboration to identify opportunities, overcome challenges, and align on critical paths. The executive sponsor demonstrated unwavering commitment by involving the Board and user community stakeholders, supporting the project manager, and ensuring the vendor met contractual obligations, which minimized unnecessary scope changes and kept the project on schedule and within budget. The project team and vendor effectively collaborated with external resources, including WaTech, the previous CMS vendor, and Jitterbit, to integrate all system components (Salesforce, SharePoint, Security, Existing CMS, SAW, Web services, Communications), while building strong partnerships with their customers, facilitating key learning for the maintenance and operation of the final solution, setting the foundation for a successful post go-live managed services contract.



In April 2022, ELUHO's CMS Modernization Project underwent a significant reset. After months of working towards implementing ILINX through ImageSource, it was determined that the proposed solution did not meet the agency's needs. ELUHO then spent two months exploring alternatives, conducting demonstrations, consulting with similar agencies, and engaging with vendors.

In August 2022, ELUHO selected Salesforce as the platform for its new CMS and Eightcloud as its implementation partner. Between August 2022 and June 2023, Eightcloud and ELUHO worked closely to design, build, and deploy the new CMS, which went live on June 16, 2023.

Now, all case documents are viewable online by people with a SecureAccess Washington (SAW) account. The public can view/download Board orders without a SAW account. Case information such as filing date, case status, parties, and filings were previously not available to users; now this info is available. Internal users were unable to update the system; only the vendor could make changes. Now ELUHO staff can configure the system without relying on vendor support. Analytics reporting was unreliable and now reports are easily created and published via the CMS.

The new system is much more accessible to residents who are researching Board caselaw and legal precedent on the public website, as well as parties to Board cases who can file materials and track case information online. It is speedier and more accessible.

The project was completed on time and was \$21,000 under budget. Total project cost was \$1.51M allocated over two years.

IMPACT

With the new system, attorneys and the public can file cases anywhere there is an internet connection. They also can view previous cases dating back to 1991. The improvements not only make these government records readily available, but the new system makes it much easier for staff to track cases, documents, and hearings, making the overall process more efficient.

ELUHO's new system allows four different audiences to access its case information:

1. **General public** - access to documents and case information that ELUHO has determined should be in the public domain.



2. **Parties to ELUHO's cases** (e.g., appellants, respondents, and their attorneys) - can file documents to their case and see and download documents on the case docket and information about the case.
3. **Interested parties** – Any member of the public can become an authenticated user to see and download documents on the case docket and information about the case.
4. **ELUHO's staff and Board members** - work collaboratively on cases and documents without needing to use any other tools or systems outside of those that are connected through the CMS architecture. All case documents, data, and communications are automatically managed and kept with the electronic case file.

The new CMS has several significant outcomes:

1. **Electronic Case Filing and Online Accessibility:** This system enables electronic case filing and provides online access to various case documents, such as party filings and case information (including party details, filing dates, and case status).
2. **Notifications and Alerts:** Case parties receive notifications about new filings in a case, ensuring they stay informed. Interested members of the public can also sign up to receive this information.
3. **Automated Document and Data Management:** Internally, all case documents, data, and communications are automatically saved to the case file, streamlining document management.
4. **Enhanced Communication:** Board members, judges, and staff can send messages and tasks to each other within the CMS and these communications are attached to the relevant case file.
5. **Custom Dashboards for Key Stakeholders:** Board members, judges, and staff have custom dashboards that display case milestones, new appeal and document filings, tasks, and more, providing a comprehensive view of case status and progress.
6. **Integrated Calendar System:** The CMS calendar is synced with Outlook, facilitating easy scheduling and management of deadlines and appointments.
7. **Templates for Efficiency:** Although not yet implemented, there are templates designed to auto-fill case data (such as case captions) and include standard language for legal documents, making it easier for staff to complete these documents.
8. **Mobile Accessibility:** The system is accessible on mobile devices and can be used in rural areas with low connectivity, ensuring widespread usability.
9. **Improved Data Governance:** One of the primary risks mitigated by this project is data and document governance. The system automatically keeps all case data, documents, and communications organized within the case file, eliminating the need to search for lost



documents and emails. The system also allows for easy deletion of records per the state retention schedule.

10. **Secure Access with SAW:** Authenticated users can securely access case documents and information through SecureAccess Washington (SAW).
11. **Legacy System Modernization:** This project replaces an outdated system from the 1990s, bringing modern capabilities and improvements.
12. **Configurable System with Salesforce:** The use of Salesforce allows for significant configurability. The organization has three internal administrators who can make many changes independently, reducing dependency on vendors and increasing flexibility.
13. **Vendor Independence:** The choice of Salesforce also provides the flexibility to switch vendors without being tied to a single custom vendor, enhancing long-term adaptability.
14. **Compliance and Accessibility:** The system meets IT accessibility and security standards.

The project achieved significant cost avoidance by eliminating redundant tasks such as saving and filing emailed or paper documents, calendaring in two places, and entering dates in multiple systems. The need for storing paper files was drastically reduced, and case files are now automatically organized in chronological order on the docket, which is crucial for cases appealed to court after board decisions. Time spent searching for email documents and communications was minimized, enhancing staff productivity. Additionally, the risk of incomplete case files was mitigated, ensuring better compliance. The use of automatic templates for standard documents further streamlined operations, saving time and ensuring consistency.

Overall, this IT project significantly enhances case management through improved accessibility, communication, document management, and modernized systems, all while providing the flexibility and security necessary for effective governance and administration.

Maximizing Value and Continuous Improvement

The 2020 Legislature allocated \$200k per year to ELUHO for the ongoing maintenance and operations of the CMS. The first year of maintenance and operations is nearly complete. During this time, several bugs were fixed, and minor enhancements were made. Users have become acclimated to the system, and customer service calls from external users have almost ceased, although some customers still need assistance with signing up for a SAW account to access the CMS. Not all components, such as Conga templates and Zoom integration for calendaring events, have been fully utilized. Over time, it is expected that ELUHO will continue working within the allocated budget with Navisite or another Salesforce vendor to steadily improve the CMS and maximize its features.

This project has brought significant value to the state of Washington by improving the accessibility, transparency, and efficiency of the state's environmental and land use hearings boards. It mitigates legal and reputational risks for the agency and enhances business efficiency.