



**COMMISSIONERS COURT
COMMUNICATION**

COURT ORDER NUMBER _____

PAGE 1 OF 14

DATE: 10/1/2024

SUBJECT: CONSIDERATION OF AMENDMENT TO THE SOFTWARE LICENSE AND PROFESSIONAL SERVICES AGREEMENT, AND SOFTWARE MAINTENANCE AGREEMENT BETWEEN TARRANT COUNTY AND TYLER TECHNOLOGIES FOR THE IMPLEMENTATION OF SOFTCODE (TYLER CIVILSERVE) APPLICATION

***** CONSENT AGENDA *****

COMMISSIONERS COURT ACTION REQUESTED

It is requested that the Commissioners Court approve an Amendment to the Software License and Professional Services Agreement, and Software Maintenance Agreement between Tarrant County and Tyler Technologies for the implementation of SoftCode (Tyler Civilserve) application.

BACKGROUND

On August 24, 2010, the Commissioners Court, through Court Order #108644, adopted a new Master Software and Services Agreement, and Maintenance and Support Services Agreement with Tyler Technologies, Inc. for various software components related to the Court Administration System.

On August 3, 2021, the Commissioners Court, through Court Order #135989, approved an Amendment to the Master Software Services Agreement, for the implementation and integration of the SoftCode application (Tyler Civilserve) with the Odyssey Case Management System (CMS) in the amount of \$862,705.00 for the JP Courts.

On November 21, 2023, the Commissioners Court, through Court Order #142198, re-approved Tyler Technologies, Inc., as the sole source for Civil Process Software.

With approval of this Amendment, the cost of the integration between SoftCode application (Tyler Civilserve) with the Judicial Information Management System (JIMS) used by the District Clerk is clarified with a not to exceed amount of \$80,080.00. The previous optional interface to TechShare is no longer in scope and is deleted from the agreement. The milestone and payment schedule are updated and clarified. This Amendment clarifies the scope and cost of the integrations required and updates the milestone payment schedule. In addition, this amendment does not increase the previously approved budget that was approved on August 3, 2021.

The Criminal District Attorney's Office reviewed this Amendment as to form.

FISCAL IMPACT

There is no fiscal impact to this request.

SUBMITTED BY	Information Technology	PREPARED BY:	Bethany Sanchez Vazquez
		APPROVED BY:	Andre Mendes

42

C.O.#143993



COMMISSIONERS COURT
COMMUNICATION

COURT ORDER NUMBER _____

PAGE 1 OF 14

DATE: 10/1/2024

SUBJECT: CONSIDERATION OF AMENDMENT TO THE SOFTWARE LICENSE AND PROFESSIONAL SERVICES AGREEMENT, AND SOFTWARE MAINTENANCE AGREEMENT BETWEEN TARRANT COUNTY AND TYLER TECHNOLOGIES FOR THE IMPLEMENTATION OF SOFTCODE (TYLER CIVILSERVE) APPLICATION

***** CONSENT AGENDA *****

COMMISSIONERS COURT ACTION REQUESTED

It is requested that the Commissioners Court approve an Amendment to the Software License and Professional Services Agreement, and Software Maintenance Agreement between Tarrant County and Tyler Technologies for the implementation of SoftCode (Tyler Civilserve) application.

BACKGROUND

On August 24, 2010, the Commissioners Court, through Court Order #108644, adopted a new Master Software and Services Agreement, and Maintenance and Support Services Agreement with Tyler Technologies, Inc. for various software components related to the Court Administration System.

On August 3, 2021, the Commissioners Court, through Court Order #135989, approved an Amendment to the Master Software Services Agreement, for the implementation and integration of the SoftCode application (Tyler Civilserve) with the Odyssey Case Management System (CMS) in the amount of \$862,705.00 for the JP Courts.

On November 21, 2023, the Commissioners Court, through Court Order #142198, re-approved Tyler Technologies, Inc., as the sole source for Civil Process Software.

With approval of this Amendment, the cost of the integration between SoftCode application (Tyler Civilserve) with the Judicial Information Management System (JIMS) used by the District Clerk is clarified with a not to exceed amount of \$80,080.00. The previous optional interface to TechShare is no longer in scope and is deleted from the agreement. The milestone and payment schedule are updated and clarified. This Amendment clarifies the scope and cost of the integrations required and updates the milestone payment schedule. In addition, this amendment does not increase the previously approved budget that was approved on August 3, 2021.

The Criminal District Attorney's Office reviewed this Amendment as to form.

FISCAL IMPACT

There is no fiscal impact to this request.

SUBMITTED BY	Information Technology	PREPARED BY:	Bethany Sanchez Vazquez
		APPROVED BY:	Andre Mendes



AMENDMENT

This amendment ("Amendment") is effective as of the date of signature of the last party to sign as indicated below ("Amendment Effective Date"), by and between Tyler Technologies, Inc. with offices at 5101 Tennyson Pkwy, Plano, Texas 75024 ("Tyler") and Tarrant County, Texas ("Client").

WHEREAS, Tyler and Client are parties to an agreement dated August 24, 2010 ("Agreement");

WHEREAS, the Agreement was modified on August 3, 2021 (the "First Amendment") and again on December 14, 2021 (the "Second Amendment") to add certain Civil Process software and;

WHEREAS, the First Amendment provided that the parties would later agree to the scope and amount due for the JIMS Interface services; and

WHEREAS, Tyler and Client desire to amend the terms of the Agreement as provided herein.

NOW THEREFORE, in consideration of the mutual promises hereinafter contained, Tyler and the Client agree as follows:

1. Tyler and Client agree that Tyler shall provide the JIMS Interface contemplated by the First Amendment, for the fees set forth in the Investment Summary attached hereto as Exhibit 1.
2. The payment milestone associated with the JIMS Interface (Table 1, Phase 2-5 as included in Section 5 of the First Amendment and Section IV(B) of Exhibit 2 thereto) is hereby replaced in its entirety with the following milestones:

Phase	Milestone	Milestone Payment	Acceptance/Invoice Criteria
2-5A	JIMS Interface Requirements Design Document	\$16,016	Requirements Design Document approved
2-5B	JIMS Interface Delivered in Test	\$32,032	Use of integration in Test environment
2-5C	JIMS Interface Delivered in Prod	\$32,032	Use of integration in Production environment
JIMS Interface Total		\$80,080	

3. For the avoidance of doubt, the above-listed milestones will be billed in accordance with the terms of the First Amendment as set forth in Exhibit 2, Section IV(B)(c).
4. Tyler shall provide the JIMS Interface services in accordance with the Statement of Work



attached hereto as Exhibit 2.

5. The following milestone under the First Amendment is deleted in its entirety:

2-6	TechShare Interface	* Invoiced only if integration is required	Use of TechShare Integration in production environment
-----	---------------------	--	--

6. Section 5 of the First Amendment is deleted and replaced with the following:

“5. Tyler shall invoice Client for the Professional Services and prorated Maintenance and Support in accordance with the following Milestone and Payment Schedule:”

7. The last row of the Milestone and Payment Schedule in the First Amendment, excerpted below, is hereby deleted.

Total Payments through October 31, 2022	\$862,705
---	-----------

8. Section 5 of the Second Amendment is deleted and replaced with the following:

“Tyler shall invoice Client for the License fees, Professional Services fees and prorated Maintenance and Support fees in accordance with the following Milestone and Payment Schedule:”

9. Tyler and the Client agree that the August 24, 2010, Agreement shall be amended to state: “All Tarrant County data shall remain the property of Tarrant County. Tyler shall not use Tarrant County data other than in connection with providing the services pursuant to this Agreement.”
10. This Amendment shall be governed by and construed in accordance with the terms and conditions of the Agreement. Except as expressly indicated in this Amendment, all other terms and conditions of the Agreement shall remain in full force and effect.

IN WITNESS WHEREOF, the parties hereto have executed this Amendment as of the dates set forth below.

Tyler Technologies, Inc.

By: Sherry Clark
Name: Sherry Clark
Title: Group General Counsel
Date: 10/16/24

Tarrant County, Texas

By: Tim O'Hare
Name: Tim O'Hare
Title: Tarrant County Judge
Date: 10/11/2024





**Exhibit 1
Amendment Investment Summary**

The following Amendment Investment Summary details the software and services to be delivered by us to you under the Agreement. This Amendment Investment Summary is effective as of the Amendment Effective Date. Capitalized terms not otherwise defined will have the meaning assigned to such terms in the Agreement.

In the event a comment in the following sales quotation conflicts with a provision of this Amendment, the provision in this Amendment shall control.

DESCRIPTION OF SERVICES	FIXED AMOUNT
<p>DEV – JIMS Interface</p> <p>Project Management</p> <p>Customizations</p> <p>Configuration & Deployment</p> <p>No Travel Expenses, As All Work Will Be Completed Remotely</p> <p>Client: Tarrant County, TX – Civil Process Integration Dev</p>	<p>\$12,480</p> <p>\$55,020</p> <p>\$12,580</p>
	<p>Total Contract Amount</p> <p>\$80,080</p>

REMAINDER OF PAGE INTENTIONALLY LEFT BLANK



Exhibit 2
Statement of Work

REMAINDER OF PAGE INTENTIONALLY LEFT BLANK

Tarrant TX CivilServe / JIMS Interface

Scope

API endpoints will be created to support importing case data into Civil Serve. Case data received from this API will be processed periodically using a Windows Scheduled Task. This processing will validate the case data and prepare the case data for import. The prepared case data will then be available in the Case Import Tool within Civil Serve. The Constable clerk can then complete the case import process by selecting a specific item from the Case Import Tool, reviewing the imported data in the Civil Serve case screen, and clicking Save to save the Civil Serve case and complete the import process. Once the imported case data has been saved, the item will be removed from the Case Import Tool. If the Constable clerk determines that the data is not valid, they can elect to reject the import and add a rejection reason. Rejecting a case import will remove the item from the Case Import Tool and send a rejection message back to the sender.

Assumptions

1. Fees are out of scope. Civil clerk may elect to add fees manually while reviewing the case for import.
2. New Civil Serve name will be created for every import unless a valid EntityId is provided in the payload.
3. New addresses will be created for every import unless EntityId is provided and the address payload exactly matches an existing address for that specific EntityId.
4. Reserve the right to limit the number of daily API calls.
5. Rejected cases must be sent back in their entirety.
6. Case routing information must be sufficient to allow for a simple one to one mapping to civil precinct.

Required Database Variables (Mapping):

	Case Import Payload
Metadata	
Route Information	Metadata.CodeMap
Case Info	
CASE.FILE_DATE	CaseAction.FilingDate



CASE.STYLE1 + CASE.STYLE2	Case.PlaintiffTitle
CASE.STYLE3 + CASE.STYLE4	Case.DefendantTitle
Party Info	
PARTYNAM.NAME	Party.PartyCaption Name.EntityName Name.FirstName
PARTYNAM.PARTY_NUM	Party.ReferenceNumber
PARTYNAM.PARTY_TYPE	Party.RoleTypeId
PARTYADR.ADDRESS1	Address.StreetName
PARTYADR.ADDRESS2	Address.Address2
PARTYADR.CITY	Address.City Address.StateCode
PARTYADR.ZIP + PARTYADR.ZIP4	Address.ZipCode
PARTYADR.COUNTY	Address.CountyName
Service Paper Info	
TRANS.DATE_DOC_PROD	Action.Note or ServiceRequest.Note
PARTYNAM.NAME	Party.PartyCaption Name.EntityName Name.FirstName
PARTYADR.ADDRESS2	Address.Address2
PARTYADR.CITY	Address.City Address.StateCode
PARTYADR.ZIP + PARTYADR.ZIP4	Address.ZipCode
PARTYADR.COUNTY	Address.CountyName
SERVTRK.TRANS_NUM	ServiceRequest.Note or ServiceRequest.CodeMap



Endpoints

The follow tables contains examples of the endpoint that will be developed to support this functionality:

POST	/case-import	Json payload containing case data that is to be imported. This endpoint will perform some basic validation to ensure required payload value have been provided. If successful, a 200 response will be returned along with a unique id associated with this request. If unsuccessful, a 400 response will be returned along with the specific validation error details.
POST	/case-import/name-search	<p>Search for existing, active name. Returns paged result.</p> <p>Example payload:</p> <pre>{ "entityName": "Smith", "firstName": "Joe" }</pre> <p>Example result:</p> <pre>[{ "entityId": 12354, "entityTypeId": 4, "entityName": "Smith", "firstName": "Joe" }, { "entityId": 987546, "entityTypeId": 3, "entityName": "Smithers", "firstName": "Joel" }]</pre>
GET	/case-import/status/{uniqueId}	Checks the status of a specific case-import request. Examples of statuses: PENDING, STAGED, IMPORTED, REJECTED
GET	/case-import/civiloffices	Returns list of civil office ids and descriptions.
GET	/case-import/actiontypes	Returns list of action type ids and descriptions.



GET	/case-import/actionstatuses	Returns list of action status ids and descriptions.
GET	/case-import/notetypes	Returns list of note type ids and descriptions.
GET	/case-import/courts	Returns list of court ids and descriptions.
GET	/case-import/roletypes	Returns list of role type ids and descriptions.
GET	/case-import/documenttypes	Returns list of document ids and descriptions.
GET	/case-import/nametypes	Returns list of name type ids and descriptions.

Case Import Payload

The follow tables contains examples of types of data the may be imported. Hierarchical relationships are represented by the (list) denotation.

Case	PlaintiffTitle DefendantTitle CivilOfficeId* CaseActions (list)
CaseAction	ActionTypeId* ActionStatusId* CourtId CourtCaseNumber FilingDate HearingDateTime Note Parties (list) Documents (list) CustomValues (list) CodeMaps (list)
Party	NameKey* RoleTypeId* IsRequestor EntityCaption ContactName ReferenceNumber Note



	ServiceRequests (list) CustomValues (list)
ServiceRequest	ServeByDate SubServeByDate ReturnDate Note AddressKey* AlternateAddressKeys (list) CodeMaps (list)
Document	DocumentDownloadUrl* DocumentTypeId*
CustomValue	CustomCode* CustomValue*
Name	NameKey* EntityId NameTypeId* EntityName* FirstName* MiddleName NameSuffix Note PrimaryAddress AlternateAddresses (list)
Address	AddressKey* StreetName Address2 Address3 StreetNumber StreetPrefix StreetType StreetSuffix City* ZipCode StateCode* CountryCode CountyName TownshipDesc



CodeMap***	SourceApp SourceCode? SourceValue? SourceFormat SourceDesc DestApp DestCode? DestValue? DestFormat DestDesc
Metadata	APIKey* WebHookUrl** CodeMaps (list)

* = Required

** = Used to communicate import statuses back to the api caller.

*** = System use only. Not visible within Civil Serve application.

Json Data Structure

The Json payload required for the POST /case-import endpoint requires a specific hierarchical structure. Here is an example of this structure.

```
{
  "names": [
    {
      "nameKey": "N01",
      "nameTypeId": 12,
      "entityName": "Smith",
      "firstName": "John",
      "primaryAddress": {
        "addressKey": "A01",
        "streetNumber": "104",
        "streetName": "Main",
        "streetType": "Street",
        "city": "Dallas",
        "stateCode": "TX",
        "zipCode": "45613-4561"
      }
    }
  ]
}
```



```
"case": {
  "civilOfficeId": 1,
  "plaintiffTitle": "Charlie Combs",
  "defendantTitle": "Franklin Pierce",
  "caseActions": [
    {
      "actionTypeId": 4,
      "actionStatusId": 2,
      "courtCaseNumber": "CJFD-4561",
      "parties": [
        {
          "nameKey": "N01",
          "roleTypeId": 3,
          "serviceRequests": [
            {
              "serveByDate": "10-15-2024",
              "addressKey": "A01"
            }
          ]
        }
      ]
    }
  ],
  "documents": [
    {
      "documentTypeId": 4,
      "documentDownloadUrl": "https://someapiconsumer/document-download?uniqueId=46541sdaf65487asdf4561sadf"
    }
  ]
},
"metadata": {
  "apiKey": "SDKFK3436730IU234",
  "webHookUrl": "https://someapiconsumer/case-import-callback"
}
}
```



09172024

APPROVED AS TO FORM:

Kimberly Colliet Wesley
Criminal District Attorney's Office*

*By law, the Criminal District Attorney's Office may only approve contracts for its clients. We reviewed this document as to form from our client's legal perspective. Other parties may not rely on this approval. Instead those parties should seek contract review from independent counsel.

Consideration of Amendment to the Software License and Professional Services Agreement, and Software Maintenance Agreement between Tarrant County and Tyler Technologies for the Implementation of SoftCode (Tyler Civilserve) Application

SIGNED AND EXECUTED this <#MeetingDateLong#>.

**COUNTY OF TARRANT
STATE OF TEXAS**

Tim O'Hare - County Judge

Tim O'Hare
County Judge
<#deefee5c-dd95-451e-039c-08dcb56d40e8-DateSigned#>



AMENDMENT

This amendment (“Amendment”) is effective as of the date of signature of the last party to sign as indicated below (“Amendment Effective Date”), by and between Tyler Technologies, Inc. with offices at 5101 Tennyson Pkwy, Plano, Texas 75024 (“Tyler”) and Tarrant County, Texas (“Client”).

WHEREAS, Tyler and Client are parties to an agreement dated August 24, 2010 (“Agreement”);

WHEREAS, the Agreement was modified on August 3, 2021 (the “First Amendment”) and again on December 14, 2021 (the “Second Amendment”) to add certain Civil Process software and;

WHEREAS, the First Amendment provided that the parties would later agree to the scope and amount due for the JIMS Interface services; and

WHEREAS, Tyler and Client desire to amend the terms of the Agreement as provided herein.

NOW THEREFORE, in consideration of the mutual promises hereinafter contained, Tyler and the Client agree as follows:

1. Tyler and Client agree that Tyler shall provide the JIMS Interface contemplated by the First Amendment, for the fees set forth in the Investment Summary attached hereto as Exhibit 1.
2. The payment milestone associated with the JIMS Interface (Table 1, Phase 2-5 as included in Section 5 of the First Amendment and Section IV(B) of Exhibit 2 thereto) is hereby replaced in its entirety with the following milestones:

Phase	Milestone	Milestone Payment	Acceptance/Invoice Criteria
2-5A	JIMS Interface Requirements Design Document	\$16,016	Requirements Design Document approved
2-5B	JIMS Interface Delivered in Test	\$32,032	Use of integration in Test environment
2-5C	JIMS Interface Delivered in Prod	\$32,032	Use of integration in Production environment
	JIMS Interface Total	\$80,080	

3. For the avoidance of doubt, the above-listed milestones will be billed in accordance with the terms of the First Amendment as set forth in Exhibit 2, Section IV(B)(c).
4. Tyler shall provide the JIMS Interface services in accordance with the Statement of Work



attached hereto as Exhibit 2.

- 5. The following milestone under the First Amendment is deleted in its entirety:

2-6	TechShare Interface	* Invoiced only if integration is required	Use of TechShare Integration in production environment
-----	---------------------	--	--

- 6. Section 5 of the First Amendment is deleted and replaced with the following:

“5. Tyler shall invoice Client for the Professional Services and prorated Maintenance and Support in accordance with the following Milestone and Payment Schedule:”

- 7. The last row of the Milestone and Payment Schedule in the First Amendment, excerpted below, is hereby deleted.

Total Payments through October 31, 2022	\$862,705
---	-----------

- 8. Section 5 of the Second Amendment is deleted and replaced with the following:

“Tyler shall invoice Client for the License fees, Professional Services fees and prorated Maintenance and Support fees in accordance with the following Milestone and Payment Schedule:”

- 9. Tyler and the Client agree that the August 24, 2010, Agreement shall be amended to state: “All Tarrant County data shall remain the property of Tarrant County. Tyler shall not use Tarrant County data other than in connection with providing the services pursuant to this Agreement.”

- 10. This Amendment shall be governed by and construed in accordance with the terms and conditions of the Agreement. Except as expressly indicated in this Amendment, all other terms and conditions of the Agreement shall remain in full force and effect.

IN WITNESS WHEREOF, the parties hereto have executed this Amendment as of the dates set forth below.

Tyler Technologies, Inc.

Tarrant County, Texas

By: Sherry Clark

By: _____

Name: Sherry Clark

Name: _____

Title: Group General Counsel

Title: _____

Date: 10/16/24

Date: _____



**Exhibit 1
Amendment Investment Summary**

The following Amendment Investment Summary details the software and services to be delivered by us to you under the Agreement. This Amendment Investment Summary is effective as of the Amendment Effective Date. Capitalized terms not otherwise defined will have the meaning assigned to such terms in the Agreement.

In the event a comment in the following sales quotation conflicts with a provision of this Amendment, the provision in this Amendment shall control.

DESCRIPTION OF SERVICES	FIXED AMOUNT
<p>DEV – JIMS Interface</p> <p>Project Management</p> <p>Customizations</p> <p>Configuration & Deployment</p> <p>No Travel Expenses, As All Work Will Be Completed Remotely</p> <p>Client: Tarrant County, TX – Civil Process Integration Dev</p>	<p>\$12,480</p> <p>\$55,020</p> <p>\$12,580</p>
	<p>Total Contract Amount</p> <p>\$80,080</p>

REMAINDER OF PAGE INTENTIONALLY LEFT BLANK





Exhibit 2
Statement of Work

REMAINDER OF PAGE INTENTIONALLY LEFT BLANK

Tarrant TX CivilServe / JIMS Interface

Scope

API endpoints will be created to support importing case data into Civil Serve. Case data received from this API will be processed periodically using a Windows Scheduled Task. This processing will validate the case data and prepare the case data for import. The prepared case data will then be available in the Case Import Tool within Civil Serve. The Constable clerk can then complete the case import process by selecting a specific item from the Case Import Tool, reviewing the imported data in the Civil Serve case screen, and clicking Save to save the Civil Serve case and complete the import process. Once the imported case data has been saved, the item will be removed from the Case Import Tool. If the Constable clerk determines that the data is not valid, they can elect to reject the import and add a rejection reason. Rejecting a case import will remove the item from the Case Import Tool and send a rejection message back to the sender.

Assumptions

1. Fees are out of scope. Civil clerk may elect to add fees manually while reviewing the case for import.
2. New Civil Serve name will be created for every import unless a valid EntityId is provided in the payload.
3. New addresses will be created for every import unless EntityId is provided and the address payload exactly matches an existing address for that specific EntityId.
4. Reserve the right to limit the number of daily API calls.
5. Rejected cases must be sent back in their entirety.
6. Case routing information must be sufficient to allow for a simple one to one mapping to civil precinct.

Required Database Variables (Mapping):

	Case Import Payload
Metadata	
Route Information	Metadata.CodeMap
Case Info	
CASE.FILE_DATE	CaseAction.FilingDate



CASE.STYLE1 + CASE.STYLE2	Case.PlaintiffTitle
CASE.STYLE3 + CASE.STYLE4	Case.DefendantTitle
Party Info	
PARTYNAM.NAME	Party.PartyCaption Name.EntityName Name.FirstName
PARTYNAM.PARTY_NUM	Party.ReferenceNumber
PARTYNAM.PARTY_TYPE	Party.RoleTypeId
PARTYADR.ADDRESS1	Address.StreetName
PARTYADR.ADDRESS2	Address.Address2
PARTYADR.CITY	Address.City Address.StateCode
PARTYADR.ZIP + PARTYADR.ZIP4	Address.ZipCode
PARTYADR.COUNTY	Address.CountyName
Service Paper Info	
TRANS.DATE_DOC_PROD	Action.Note or ServiceRequest.Note
PARTYNAM.NAME	Party.PartyCaption Name.EntityName Name.FirstName
PARTYADR.ADDRESS2	Address.Address2
PARTYADR.CITY	Address.City Address.StateCode
PARTYADR.ZIP + PARTYADR.ZIP4	Address.ZipCode
PARTYADR.COUNTY	Address.CountyName
SERVTRK.TRANS_NUM	ServiceRequest.Note or ServiceRequest.CodeMap



Endpoints

The follow tables contains examples of the endpoint that will be developed to support this functionality:

POST	/case-import	Json payload containing case data that is to be imported. This endpoint will perform some basic validation to ensure required payload value have been provided. If successful, a 200 response will be returned along with a unique id associated with this request. If unsuccessful, a 400 response will be returned along with the specific validation error details.
POST	/case-import/name-search	<p>Search for existing, active name. Returns paged result.</p> <p>Example payload:</p> <pre>{ "entityName": "Smith", "firstName": "Joe" }</pre> <p>Example result:</p> <pre>[{ "entityId": 12354, "entityTypeId": 4, "entityName": "Smith", "firstName": "Joe" }, { "entityId": 987546, "entityTypeId": 3, "entityName": "Smithers", "firstName": "Joel" }]</pre>
GET	/case-import/status/{unique Id}	Checks the status of a specific case-import request. Examples of statuses: PENDING, STAGED, IMPORTED, REJECTED
GET	/case-import/civiloffices	Returns list of civil office ids and descriptions.
GET	/case-import/actiontypes	Returns list of action type ids and descriptions.



GET	/case-import/actionstatuses	Returns list of action status ids and descriptions.
GET	/case-import/notetypes	Returns list of note type ids and descriptions.
GET	/case-import/courts	Returns list of court ids and descriptions.
GET	/case-import/roletypes	Returns list of role type ids and descriptions.
GET	/case-import/documenttypes	Returns list of document ids and descriptions.
GET	/case-import/nametypes	Returns list of name type ids and descriptions.

Case Import Payload

The follow tables contains examples of types of data the may be imported. Hierarchical relationships are represented by the (list) denotation.

Case	PlaintiffTitle DefendantTitle CivilOfficeId* CaseActions (list)
CaseAction	ActionTypeId* ActionStatusId* CourtId CourtCaseNumber FilingDate HearingDateTime Note Parties (list) Documents (list) CustomValues (list) CodeMaps (list)
Party	NameKey* RoleTypeId* IsRequestor EntityCaption ContactName ReferenceNumber Note



	ServiceRequests (list) CustomValues (list)
ServiceRequest	ServeByDate SubServeByDate ReturnDate Note AddressKey* AlternateAddressKeys (list) CodeMaps (list)
Document	DocumentDownloadUrl* DocumentTypeId*
CustomValue	CustomCode* CustomValue*
Name	NameKey* EntityId NameTypeId* EntityName* FirstName* MiddleName NameSuffix Note PrimaryAddress AlternateAddresses (list)
Address	AddressKey* StreetName Address2 Address3 StreetNumber StreetPrefix StreetType StreetSuffix City* ZipCode StateCode* CountryCode CountyName TownshipDesc



CodeMap***	SourceApp SourceCode? SourceValue? SourceFormat SourceDesc DestApp DestCode? DestValue? DestFormat DestDesc
Metadata	APIKey* WebHookUrl** CodeMaps (list)

* = Required

** = Used to communicate import statuses back to the api caller.

*** = System use only. Not visible within Civil Serve application.

Json Data Structure

The Json payload required for the POST /case-import endpoint requires a specific hierarchical structure. Here is an example of this structure.

```
{
  "names": [
    {
      "nameKey": "N01",
      "nameTypeId": 12,
      "entityName": "Smith",
      "firstName": "John",
      "primaryAddress": {
        "addressKey": "A01",
        "streetNumber": "104",
        "streetName": "Main",
        "streetType": "Street",
        "city": "Dallas",
        "stateCode": "TX",
        "zipCode": "45613-4561"
      }
    }
  ]
},
```



```
"case": {
  "civilOfficeId": 1,
  "plaintiffTitle": "Charlie Combs",
  "defendantTitle": "Franklin Pierce",
  "caseActions": [
    {
      "actionTypeId": 4,
      "actionStatusId": 2,
      "courtCaseNumber": "CJFD-4561",
      "parties": [
        {
          "nameKey": "N01",
          "roleTypeId": 3,
          "serviceRequests": [
            {
              "serveByDate": "10-15-2024",
              "addressKey": "A01"
            }
          ]
        }
      ]
    },
    {
      "documentType": 4,
      "documentDownloadUrl": "https://someapiconsumer/document-download?uniqueId=46541sdaf65487asdf4561sadf"
    }
  ]
},
"metadata": {
  "apiKey": "SDKFK3436730IU234",
  "webHookUrl": "https://someapiconsumer/case-import-callback"
}
}
```



09172024

APPROVED AS TO FORM:

Kimberly Colliet Wesley
Criminal District Attorney's Office*

*By law, the Criminal District Attorney's Office may only approve contracts for its clients. We reviewed this document as to form from our client's legal perspective. Other parties may not rely on this approval. Instead those parties should seek contract review from independent counsel.