THIN LINE SOFTWARE
TEXAS COURT SOFTWARE GUIDE

What to look for in Texas municipal and justice-court software.

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What judges and clerks should evaluate-from Texas-specific workflows and reporting to financials, conversion, online services, and support.

A practical guide to evaluating court case-management systems for Texas municipal and justice courts.

Choosing court software is not simply a matter of finding a system that stores cases and takes payments. A Texas municipal or justice court must manage the case from filing through appearance, plea, court action, financial activity, reporting, and final disposition-including Texas-specific workflows such as compliance dismissals, deferred disposition, driving safety courses, indigency, warrants, and collections.

The best court system is not necessarily the one with the longest feature list. It is the one that helps the court manage the work correctly while maintaining a dependable case record underneath it.

Start with the life of the case

Before looking at dashboards, ask the vendor to demonstrate an entire case.

> *Citation -> filing -> appearance -> plea/request -> court action -> judgment/disposition -> financial activity -> reporting -> close*

Real cases branch. A defendant might pay, request deferred disposition or a driving safety course, seek a compliance dismissal, fail to appear, or return later to resolve the case. The software has to preserve one coherent case record through those changes.

> **DEMO THIS**
> Deferred disposition from request through completion or noncompliance. Don't just ask whether the system supports it. Ask the vendor to show what the clerk does, what the judge does, what requirements and deadlines are created, and what happens when the defendant complies or doesn't.

Make the case record the center of the system

Open a case and ask whether you can understand what has happened without opening five other screens. Not everything has to appear simultaneously. The pieces should belong to a coherent case record.

Evaluate the clerk's daily workspace

Don't spend the entire demonstration looking at an individual case. Ask how a clerk knows what needs attention today-new filings, upcoming appearances, compliance deadlines, unpaid balances, warrants, and unresolved online requests.

> **What a good court system should answer**
> What happened on this case? What still needs to happen?

Test case intake and the offense catalog

Ask the vendor to demonstrate how a citation becomes a court case, and what the clerk still has to enter if citations arrive electronically.

Because the selected offense can affect statutory information, fines, costs, reporting, and available case options, ask who maintains the catalog and how changes are versioned.

> **Ask the vendor**
> - Who maintains the offense catalog?
> - How are Texas legislative changes handled?
> - How are DPS codes maintained?
> - Can our court maintain local ordinances?
> - Can obsolete offenses be retired without damaging historical cases?
> - How are effective dates handled?
> - Can different versions of a statute coexist for offenses committed during different periods?

> *A court should not have to rewrite history every time the Legislature changes the law.*

Evaluate defendant identity and search

Ask what happens when the same person receives multiple citations or has cases over several years. If the defendant changes their address today, what happens to the address associated with a case from five years ago?

> **Try these searches**
> - Find everything involving this defendant.
> - I only know part of the last name and DOB.
> - Find this citation number.
> - Show every open case for this person.
> - Find cases involving this officer during this date range.

Make Texas court workflows real workflows

A vendor may have excellent court software and still be a poor fit for a Texas municipal or justice court. A system can have a button labeled "Dismiss," "Warrant," or "Deferred" without actually supporting the Texas workflow behind that action.

Demo the procedures your court actually uses

Ask the vendor to demonstrate the Texas procedures your court uses. Recording that a case was dismissed, deferred, or sent to collections is different from supporting the process that gets the court there.

DEMO THIS

Compliance dismissal: eligibility, statutory requirements, proof, deadlines, applicable fees, clerk review, judicial approval where required, dismissal reason, and the final order.

For deferred disposition, ask to see request -> eligibility -> order -> conditions -> successful completion or failure -> disposition. For a driving safety course, ask to see eligibility, the request, fees, the deadline, completion or failure, and final disposition.

Current Texas law addresses installment payments, community service, and waiver of fines and costs in appropriate circumstances. Demo the court's process-not only balance-due -> payment.

DEMO THIS

Ability to pay: request or intake, judicial review, a payment plan, community service, waiver or reduction where authorized, deadlines, and the resulting orders.

Separate what the clerk can do from what the judge must do

A clerk and a judge do not have interchangeable authority. The software should make the proper path easier. It should not quietly blur the distinction between administrative and judicial actions.

Ask the vendor

- Who can accept this request?
- Who can approve it?
- Who can enter this order?
- Does this action require judicial review?
- Can the court configure its workflow around standing orders or delegated clerk authority where legally permitted?
- What happens when the request falls outside that authority?

Evaluate pleas, judgments, warrants, and bonds as work

A plea is not the same thing as a judgment. For payment-in-full workflows, ask exactly how the system handles the plea and judgment associated with the payment rather than simply reducing the balance to zero.

> *A zero balance is not a complete court record.*

Don't ask whether the system can print warrants. Ask how a case gets from failure to appear or comply to an issued warrant-and what happens afterward, including recall.

If the court handles bonds, walk cash, surety, personal, and appeal bonds through receipt, application to the case, forfeiture, refund, and release. The case-management side and the financial side should agree.

Ask how the court identifies cases that have stopped moving and why a case is in collections-not only whether it has a Collections status.

Do not assume the adult workflow can be reused with a different age flag. Texas justice and municipal court law contains specific provisions affecting children, including limits relating to confinement for failure to pay or appear.

Follow the money without losing the case

Court software is also a financial system. A payment screen that accepts a credit card is only the beginning. The legal record and the financial activity must agree.

> **DEMO THIS**
> Ask the vendor to demonstrate assessment -> payment -> allocation -> receipt -> adjustment -> refund -> reconciliation -> reporting.

> **Texas requirement**
> Texas law has specific requirements around the assessment and collection of court costs. For example, Chapter 103 of the Code of Criminal Procedure addresses payment, collection, and recordkeeping, including requirements concerning bills of cost in justice and municipal courts.

Make reporting, documents, and history trustworthy

The numbers on a report, the documents the court issues, and the history of how a case got to its current state have to remain explainable after the hearing is over.

> **Texas requirement**
> The Office of Court Administration states that court activity reports are required monthly under Government Code §71.035(b) and Chapter 171 of the Texas Administrative Code, and OCA provides separate reporting resources for justice and municipal courts. OCA also notes that municipal courts have reporting obligations to various state agencies and entities and directs courts to Texas Municipal Courts Education Center resources for broader municipal-court reporting requirements.

For the monthly close process-classification, reconciliation, CARD, and corrections-read the Texas Municipal Court OCA Reporting Guide.

> **DEMO THIS**
> Ask the vendor to enter activity on actual cases, generate the applicable report, show where each reported number comes from, identify exceptions, correct a case, and regenerate the report.

> **Ask the vendor**
> If the number on the report looks wrong, how does the clerk determine which cases produced it? A report isn't trustworthy just because it has the correct headings.

OCA reporting is only one submission. Inventory the other reports, notices, and exports your court depends on and make that inventory part of the implementation scope.

Test audit history and documents

Pick a case. Change something important. Then ask the vendor to show exactly who changed what, and when.

> *A case's current state tells you where it ended up. Its history tells you how it got there.*

A generated template is not the same thing as a preserved historical court record. A signed judgment should not change whenever the database changes.

Ask the vendor to build a docket, then change it. The system should support the actual courtroom process, not just produce a list of case numbers.

Connect the courthouse to the outside world

Cases arrive from law enforcement, defendants act online, and other systems need information from the court. Those connections only help if they enter the same operational record the clerk uses at the counter.

Don't accept "we integrate with citations" as an answer. Ask to see one arrive.

An online portal should not simply be a payment page. Ask what a defendant can actually do-and whether the online request enters the same workflow the clerk would use if the defendant walked up to the counter.

> *If online activity creates an email that someone has to manually interpret and re-enter into the case system, the court hasn't really digitized the workflow. It has created another inbox.*

Ask the vendor to configure realistic roles: judge, court administrator, clerk, cashier, finance, prosecutor where applicable, and system administrator. Can this clerk take payments but not alter judgments? Can this employee view cases but not issue warrants?

Protect the court through the transition and after go-live

A good product can still fail through a conversion that leaves balances unexplained, training that only shows the Cases menu, or a vendor that cannot say how Texas legislative changes become software changes.

If you're replacing an existing court system, your historical cases are part of the project. Ask what will not be converted. That question is often more revealing than asking what will.

For a fuller treatment of court conversion-cases, payments, warrants, documents, and balances-read the data conversion guide.

Ask what evidence will show the implementation is actually complete. Read the Public Safety Software Implementation Readiness Guide.

Ask what happens to the court's records if the relationship ends, including format, cost, timing, and attachments.

Ask vendors to train by role and workflow-not merely by screen.

> **Ask references**
> - When something is wrong with a court case, can you reach someone who understands Texas court workflow?
> - How long does it normally take to get an answer?
> - What happens when the problem affects court that morning?
> - How are legislative or reporting changes communicated?

Ask for a recent Texas change and have the vendor explain how it moved from law or reporting requirement into production.

Compare five-year total cost, including licensing, implementation, conversion, training, payments, interfaces, support, and likely increases.

> *What is annoying about the software?*

Make every finalist demonstrate the same cases

Create your own script. Don't let each vendor choose what to show.

For example:

> **Scenarios A-D**
>
> - A - Citation intake. Receive a citation electronically, create the case, verify the defendant and offense, and show everything the clerk must do before the case is ready.
> - B - Compliance dismissal. A defendant submits proof that a correctable violation has been remedied. Show eligibility, documentation, applicable fee, clerk/judge workflow, order, dismissal, and reporting.
> - C - Deferred disposition. Process the request, establish conditions and deadline, then show both successful completion and failure.
> - D - Ability to pay. A defendant cannot immediately pay the judgment. Show the court's workflow for judicial review and the resulting payment/community-service/other authorized resolution.

> **Scenarios E-H**
>
> - E - Failure to appear. The defendant misses the required appearance. Show what becomes due for court action, warrant workflow, subsequent appearance, and resolution.
> - F - Financial correction. Take a payment, discover it was entered incorrectly, correct it, and show the financial and audit history.
> - G - Monthly reporting. Generate the applicable OCA activity report, identify the cases behind a reported number, correct one case, and regenerate the report.
> - H - Audit. Change significant information on an existing case and show exactly who changed what and when.

Now you're comparing systems rather than sales demonstrations.

A practical court-software evaluation scorecard

Weight the evaluation toward the work the court actually has to do:

Category	Suggested weight
Core case-management workflow	15%
Texas-specific court workflows	15%
Clerk/judge usability	10%
Financials & accounting controls	10%
Texas reporting	10%
Online defendant services	10%
Documents, audit & permissions	10%

Data conversion	5%
Implementation & training	5%
Support/Texas expertise	5%
Cost & contract	5%
Total	100%

Change the weights to reflect your court. Also identify mandatory requirements that a system must satisfy regardless of its overall score. For example:

- Must produce required OCA reporting.
- Must preserve historical financial activity during conversion.
- Must distinguish clerk and judicial authority.
- Must provide acceptable data ownership/export terms.

A vendor shouldn't overcome a mandatory deficiency by having a prettier dashboard.

30 questions to bring to every court-software demonstration

Print this section and keep it open during vendor demos.

1. Show us a citation from intake through final disposition.
2. Show us what a clerk sees when beginning the day.
3. Show us what a judge sees.
4. How do electronic citations enter the court?
5. Who maintains Texas offenses and statutes?
6. How are legislative changes handled?
7. Show us a compliance dismissal from request through disposition.
8. Show us deferred disposition.
9. Show us a driving safety course workflow.
10. Show us a not-guilty plea through docketing.
11. Show us how pleas and judgments are recorded separately.
12. Show us an ability-to-pay workflow.
13. Show us a payment plan.
14. Show us community-service handling.
15. Show us a warrant from judicial action through recall or execution.
16. Show us how bonds are handled.
17. Show us a juvenile/minor case.
18. Show us what a defendant can do online.
19. Do online requests enter the same workflow as in-person requests?
20. Show us the applicable OCA monthly report.
21. Show us which cases produced one number on that report.

22. Show us a payment, reversal/adjustment, and refund.
23. Show us the audit history of a case.
24. Show us how permissions differ for a clerk and judge.
25. What exactly will be converted from our current system?
26. How will financial balances be validated during conversion?
27. How do we retrieve our data if we leave?
28. Who will actually implement and train our court?
29. Who answers when we need support after go-live?
30. What will the system cost us over five years?

Watch for these warning signs

- The demo is mostly dashboards. Ask them to process a case.
- Every Texas workflow is a generic status field. A status of "Deferred" isn't the same thing as administering deferred disposition.
- "Texas compliant" is the answer to every question. Ask what that means.
- The vendor cannot explain who maintains Texas offenses and legislative changes. That responsibility will eventually land somewhere.
- Online services are really an email generator. A digital request should enter a controlled court workflow.
- Payments work, but accounting is difficult to explain. Make them show the ledger and audit history.
- A clerk can perform anything a judge can perform. Ask more questions.
- Reporting is a black box. If staff cannot trace a report number back to the underlying cases, correcting problems becomes unnecessarily difficult.
- Historical conversion is described as "we'll bring everything over." Ask exactly what "everything" means.
- Signed documents change when current case data changes. Historical court documents need integrity.
- Roadmap functionality is demonstrated as though it exists today. Ask: Can our court use this in production right now?

The final question

After comparing features, workflows, reporting, financials, conversion, implementation, support, and price, ask:

> *Does this system help our court administer the case-or does it simply store the result?*

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