

Surrogate Filing Digital Service | Overview

Background

Justice Digital is a multi-million dollar 4-year investment by the Government of Alberta to deliver significant modernization of Alberta's justice system. Given the importance of maintaining essential court operations during the COVID-19 pandemic, among the early objectives of Justice Digital include reducing in-person visits to courthouses by offering services online.

One of the first Justice Digital initiatives will create a **digital filing service for surrogate estate applications**.

Summary

The Justice Digital team conducted interviews, workshops and surveys with the Court of Queen's Bench, court administration, and members of the legal community including lawyers and legal assistants to understand and define the existing challenges and opportunities for the digitization of filing surrogate estate applications.

The following issues and pain points were identified:

- Current Non-Contentious (NC) forms ask for the same information multiple times, increasing the possibility of error and requiring duplicate data entry and data review
- Payment must be made in-person at the court counters
- There is not enough information or resources available to empower self-represented applicants to determine which type of application to make or which forms are required, resulting in repeat courthouse visits and higher rejection rates
- Applications are filed on paper and then scanned by clerks to enable digital distribution and review
- Clerks and justices should be able to review and approve applications from locations other than their own courthouse(s) to account for differences in workload and travel

Proposed Approach

The Justice Digital team is using a collaborative approach to re-envision surrogate estate applications and explore digital-first solutions to overcome the key challenges identified. We will a) collaborate with the Surrogate Rules Advisory Committee (SRAC) ad-hoc forms committee, capitalizing on their foundational and visionary work to redesign the NC forms, and b) use service design approaches to ensure that the new service is focused on meeting user needs.



Proposed Solution

A new digital service for filing surrogate estate matters is being developed - one with data entry, workflows, and a separate data repository for surrogate estate applications. The new service will:

- Eliminate use of NC forms, combining all data entry into digital browser-based input screens (based on the new streamlined GA forms)
- Use field validation and conditional fields to reduce error
- Include online payments
- Provide dashboard views based on user type: legal assistants or lawyers, clerks, justices, and court administration staff
- Use notifications to alert applicants about changes to application status
- Provide reporting capabilities for court administration staff
- Enable a provincial “bucket” of applications for self-assignment by clerks and justices independent of physical location, resulting in more consistent application turnaround times

Benefits

The new service will:

- Reduce errors and rejections
- Speed up turn-around times for application reviews and approvals
- Enable re-submitted applications to be reviewed sooner
- Reduce paper applications and files for surrogate estate matters
- Reduce the need for visits to courthouses
- Streamline data entry, reduce duplicate entry
- Reduce paper printing, paper filing, scanning
- Increase utilization and efficacy of court administration and judicial resources

Get involved

The Justice Digital team is looking for lawyers, paralegals and legal assistants throughout the province that are interested in providing online and remote feedback about the design and usability of the new service and how it will support your surrogate estate practice.

Upcoming opportunities for online and remote feedback over the coming months may include:

- **Interviews** – one-on-one conversations with members of the Justice Digital team
- **Workshops** – group discussions about the proposed service, and potential issues and opportunities
- **Usability testing** – one-on-one observation of you using the new system

Please [provide your contact information online](#) to get involved.

Contact

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