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FACT SHEET

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Phoenix Program

The Phoenix Program is a statewide technology initiative that provides transition assistance to the courts moving from county stewardship to the judicial branch's financial and human resources systems as a result of Assembly Bill 233. The program is managed by the Administrative Office of the Courts (AOC), Northern/Central Regional Office in Sacramento.

History of the Phoenix Program

The Lockyer-Isenberg Trial Court Funding Act of 1997 (Assem. Bill 233) was enacted effective January 1, 1998, as a means of ensuring equal access to justice throughout California. This law shifted the responsibility for funding the trial courts from the counties to the state.

Historically, most accounting, personnel, and other administrative services had been handled by the counties or outsourced to vendors. Now, due to the implementation of AB 233, many courts are faced with performing their own functions relating to human resources and finance, but most lack the experience and resources to accomplish this successfully. Many counties that had once provided accounting and human resources support to the trial courts before state funding have announced significant fee increases to continue these functions, while others have notified the courts that they will no longer perform these services, leaving the courts in a serious predicament. The Phoenix Program was launched as a major effort to fill the services gap for the courts.

Phoenix Components

Phoenix comprises two major components: the Phoenix Financial System (formerly CARS) and the Phoenix Human Resources System (formerly CHRIS). SAP, an internationally recognized financial systems software, was selected as the enterprise resource planning solution to host the trial courts' financial and human resources management systems.

Phoenix Financial System

The Phoenix Financial System provides a diverse range of services, including accounting and financial services, a centralized treasury system, trust accounting services, and core business analysis and support.

Implementation of the statewide trial court financial system and centralized treasury enables the courts to produce a standardized set of monthly, quarterly, and annual financial statements that comply with existing statutes, rules, and regulations. The objectives of the system are to:

- Standardize the accounting and business functions;
- Maximize investment opportunities and timely use and disbursement of cash;
- Ensure uniformity of financial record keeping and maintenance;
- Provide consistency of data and quality of management information; and
- Provide judicial partners with comprehensive financial information on a regular and timely basis.

In December 2002, the Phoenix Financial System was successfully piloted in the Superior Court of Stanislaus County. It has since been implemented in 57 courts (as of July 1, 2008). Due to volume and complexity, deployment to the final and largest court will be in two phases commencing with the first phase of implementation in July 2008 and the remaining implementation scheduled for July 2009. Deployment will continue until all 58 superior courts are fully on the statewide financial management system uniformly employing the following system modules:

- General Ledger
- Cost Accounting
- Materials Management
- Accounts Payable
- Accounts Receivable
- Project Accounting
- Trust Accounting
- Business Information Warehouse
- Grants Management
- Fixed Asset Management

Phoenix Human Resources System

The Phoenix Human Resources System is the human resources component built on the SAP platform that runs the Phoenix Financial System. This will be used by all trial courts to support their human resources management and administration needs.

The Phoenix Human Resources System will benefit all courts by:

- Providing a consistent tool to maintain human resources data;
- Integrating human resources and finance systems; and
- Eliminating non-value-added operational functions, such as duplicate data entry.

While each court may have unique requirements that will be addressed during deployment (for example, court-specific benefit plans or payroll processing requirements), the goal is to identify and incorporate into the system the common data and process requirements. The SAP human resources modules include:

- HR Structure
- Personnel Administration
- Organizational Management
- Benefits
- Time Management
- Payroll
- Employee and Manager Self-Service

In 2006, the Superior Court of Sacramento County was the first court to implement the Phoenix Human Resources System modules. Five additional courts (Lake, Riverside, Santa Cruz, Siskiyou, and Stanislaus) went live on the system in January 2007. Rollout of the system's HR component will continue after a planned upgrade of the SAP system software currently under way. Projected completion is in 2012.

Contact:

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