

**County Commissioners**  
Colm Willis, Chair  
Kevin Cameron  
Danielle Bethell



**Chief Administrative  
Officer**  
Jan Fritz

**MARION COUNTY BOARD OF COMMISSIONERS  
WORK SESSION**

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**Sheriff's Office Julota Demonstration  
Minutes**

Thursday, May 21, 2026, 9:30 a.m. – 10:30 a.m.  
Commissioners' Boardroom  
Courthouse Square, 555 Court St. NE, Suite 5231  
Salem, Oregon 97301

**ATTENDANCE:**

**Commissioners:** Kevin Cameron, and Danielle Bethell.

**Board's Office:** Trevor Lane, Jonathan Sanford, Kendall Hall, Matt Lawyer, Chris Eppley, and Toni Whitler.

**Legal Counsel:** Steve Elzinga.

**Sheriff's Office:** Jeremy Landers, Jason Bernard, and Mary-Jane Sphoon.

**Information Technology (IT):** Gordon Patchell, and Gary Christofferson.

**District Attorney (DA):** Lena Prine.

**Julota:** Joshua Cast

**Keizer Police Department:** Andrew Copeland, and Chris Nelson

**Salem Police Department:** Lance Diede.

Commissioner Kevin Cameron called the meeting to order at 9:34 p.m.

**1. Welcome & Introductions**

-Commissioner Kevin Cameron

**2. Presentation**

-Mary-Jane Sphoon & Joshua Cast

- Overview of current case management challenges:
  - Existing system (Penelope, migrating to Apricot) is unreliable:
    - Data and case notes often do not save or require repeated entry.
    - Including Health Insurance Portability and Accountability Act (HIPAA) protected information
  - Reporting capabilities limited and not providing level of data needed.
  - Annual cost for system has risen to approximately \$8,000.
- Introduction to Julota platform:
  - Cloud based system with cross agency case management and data sharing.
  - Compliance features:
    - Health Insurance Portability and Accountability (HIPAA).
    - 42 Code of Federal Regulations (CFR) Part 2 - substance use.
    - Law enforcement security requirements.
  - Supports creation of care teams around clients connecting:
    - Hospitals.
    - Primary care.
    - Behavioral health.

- Social services.
    - Emergency Medical Services (EMS).
    - Jail facilities.
  - Integrates with a wide range of external systems:
    - Hospital Electronic Health Records (EHRs):
      - Epic, Cerner, Meditech.
    - Fire/EMS software:
      - Emergency Services Officer (ESO), Zoll, ImageTrend, etc.
    - Law enforcement RMS/CAD systems:
      - Spillman, Tyler Tech, New World, Central Square, and others.
    - Social services / behavioral health platforms and Health Information Exchange (HIEs):
      - Via configurable interfaces.
- Data integration and interoperability:
  - Can interface with Dr. Cloud:
    - Marion County's Health & Human Services HER.
    - As long as data can be exported.
    - Supports one way or two-way data flows.
  - Interfaces with law enforcement Records Management System (RMS)/Computer-Aided Dispatch (CAD) systems:
    - Vendors may charge their own fees for integrations.
  - Workaround:
    - Full two-way integration is cost prohibitive by configuring automated extracts/imports with IT.
  - Designed to act as hub and spoke:
    - Hub:
      - Administering organization.
      - County, city, Police department (PD), health department, etc.
    - Spokes:
      - Community partners who access system at no license cost.
      - With finely controlled access rights.
- Referral and field use workflows:
  - Supports configurable referral forms can be tailored to each program's needs.
  - Referral process:
    - Referrals received from multiple sources.
    - Behavioral health, public health, EMS, PD, hospitals, etc.
    - Accept/reject workflow closes feedback loop:
      - Referrers notified of acceptance or rejection and reason.
  - "No login" referral method for law enforcement:
    - Car laptops to be pre-populated referral forms with RMS information:
      - Minimizing officer data entry.
    - Officers submit referrals in the field:
      - Case managers receive real time alerts.
  - Mobile access:
    - Usable on smartphones via browser.
    - Two-factor authentication with time limited code:
      - Protects Protected Health Information (PHI)/ Personally Identifiable Information (PII).
    - Does not require device certificates:
      - Integrate with an organization's existing Single Sign-On (SSO) and Two-Factor Authentication (2FA) solution.
- Case management and client view:
  - Configurable program services, assessments, forms, checklists, and surveys:

- Law Enforcement Assisted Diversion (LEAD), homeless outreach, EMS programs, behavioral health.
  - Client View feature:
    - Aggregates cross system information on client:
      - Demographics, services received from multiple departments.
    - Supports multi-disciplinary coordination without requiring all partners to be on Julota:
      - Can pull from other systems.
  - Risk flags from RMS and other data to prepare staff before client contact:
    - Fall risk, substance use, homelessness, threat level
  - Automatic notifications to case managers:
    - When clients have new 911 calls, ED visits, or criminal activity.
- Release of Information (ROI) and compliance:
  - Supports complex ROI requirements:
    - Combined HIPAA and 42 CFR Part 2 consents.
  - Electronic signatures captured directly on mobile devices:
    - Lifecycle dates tracked with proactive alerts before ROI expiration.
  - Clients can revoke or modify consent:
    - Revocations/changes are auditable for subpoena or legal requests.
  - Subpoena support:
    - System can generate longitudinal records for subpoena responses.
    - Standardized subpoena exports to reduce manual vendor involvement.
- Data reporting and analytics:
  - Internal reporting:
    - Built-in reports for metrics, diversion outcomes, and utilization:
      - EMS usage, jail bookings, days in jail.
    - Automated scheduling and report distribution to certain stakeholders:
      - Commissioners, District Attorney's (DA's) office.
  - External analytics via data warehouse:
    - Optional hosted data mart as a \$10,000/year add on:
      - Azure based mirror of Julota plus other integrated systems.
    - Power Business Intelligence (BI) analytic and dashboard support.
  - Example implementations:
    - Durham, North Carolina:
      - Power BI dashboards of non-violent crisis response metrics, demographic breakdowns, heat maps, and Computer-Aided Dispatch (CAD) based diversion data.
    - Whatcom County, Washington:
      - Pre/post-enrollment analysis and cost avoidance calculations.
      - Multi-million-dollar savings.
- Funding and Rural Health Transformation Program (RHTP):
  - RHTP as major potential funding stream:
    - Federal funds administered by states for rural/vulnerable populations.
  - Cross-sector integration and outcome tracking aligns with requirements:
    - EMS, law enforcement, health, and social services data sharing.
  - Offer RHTP background and example materials:
    - Help structure an application or concept for Oregon.
- Implementation and onboarding:
  - Estimated 8–12 weeks from contract to go live:
    - Configuration of workflows and forms.
    - Integration work with local systems where feasible.
  - Training of teams.
  - Ongoing configuration support included in base cost for changes:

- Workflows, assessments, and reports as programs evolve.

### 3. Questions

-All

- System integration and technical questions:
  - Clarification requested on integration with Dr. Cloud EHR:
    - Can Julota receive and send data to Dr. Cloud?
    - Confirmation of one-way vs two-way costs:
      - \$2,800 per direction per year on Julota's side.
      - Additional cost expected from Dr. Cloud vendor for interface.
  - Integration with county's law enforcement RMS Enterprise Information Services (EIS)/Tyler):
    - If Julota has existing interface or a new one must be built.
    - If county should expect separate bill from RMS vendor for integration.
    - RMS systems often lack landing place for longitudinal data being pushed back from Julota.
  - CAD integration:
    - How dispatch/CAD data is ingested:
      - Via real time Application Programming Interface (API).
    - Integration will be CAD level or incident-based RMS/Electronic Patient Care Report (EPCR) data.
    - How mixed environments are handled:
      - Different CAD/RMS vendors across jurisdictions.
  - Security and access:
    - Whether device certificates are required on phones.
    - 2FA approach and any preferred 2FA software:
      - None.
      - Will integrate with existing systems.
    - Options for SSO with county infrastructure.
- Field operations and usability:
  - What interface will look like for specific teams:
    - LEAD, Mobile Crisis Response Team (MCRT), homeless outreach.
  - Which devices would be used in the field:
    - Mobile Data Terminal (MDTs) versus phones versus tablets.
  - No logging in of referrals, the RMS/CAD system pre-populates the form, officer workload decreased:
- Data, reporting, and costs:
  - How dispatch and CAD data will be for alerts and support diversion tracking.
  - Clarification on the nature of Durham's public dashboard:
    - A city, county, or state level solution.
    - Why Power BI was used.
    - Why similar dashboards are not provided as a native Julota portal.
  - Data warehouse questions:
    - Data warehouse is part of core product or an add on:
      - Confirmed as \$10,000 a year add on.
    - How Azure storage costs will scale with data volume and integrations:
      - Unknown until scoped.
    - Warehouse is mirror of Julota data or separate database:
      - Mirror with ability to incorporate other systems.
  - Subpoena/export workflows:
    - Every subpoena export needs vendor involvement and associated cost.

- High frequency subpoena can be met with in-system hot button exports at no per request fee.
- Licensing, users, and scope:
  - Clarification on licensing model:
  - Whether quoted pricing is for an enterprise license or per user licensing.
  - How many users can be supported under base price:
    - Deputies, officers, outreach workers.
  - Scope questions:
    - If county applications would be replaced and consolidated into Julota.
    - How to include partners while Marion County holds the primary license.
    - What data sharing agreements are needed with partners using tool.
- Procurement, budget, and funding source questions:
  - Concerns about hidden costs beyond base annual price:
    - Integration fees from third party vendors.
    - Azure storage.
    - Data warehouse.
    - Interfaces.
  - Acknowledge realistic annual cost likely in \$45,000–\$50,000 range”
    - Given additional modules and integrations.
  - Questions on procurement path:
    - If Request for Proposal (RFP) will be required due to total cost.
    - Possibly use cooperative purchasing via Clackamas County’s existing contract with Julota.
  - Funding source exploration:
    - Consider using opioid settlement dollars as primary funding source.
    - Possibility of leveraging HB 4002 funds and/or RHTP grants.
    - Rural vs non-rural eligibility:
      - Salem and Keizer generally not considered rural.
      - Surrounding areas may be.
- Strategic and operational planning questions:
  - All relevant partners are included in design and implementation discussions:
    - Health, fire, EMS, law enforcement, and homeless services.
  - Pursue phased implementation or immediate multi-agency deployment:
    - Preference for rapid deployment for Salem/Marion County teams.
  - Need for consolidated question list:
    - Action to compile questions to send back to vendor for clarification:
      - Pricing.
      - Licensing.
      - Integration details.
      - User counts.
      - Memorandum of Understanding (MOUs).
  - How Julota can feed state mandated Homeless Management Information System (HMIS) systems and support modern, practical data entry for front line teams.

**Adjourned** – time: 10:46 p.m.  
**Minutes by:** Mary Vityukova  
**Reviewed by:** Gary L. White