

FY 2027 Department Funding Request for a NEW Position

Department/Program #	Department Name / Program	Priority #	Department Improvement Title
08060-0001	08060 - COUNTY CLERK PROBATE/MENTAL/0001 - ADMIN	1	Deputy County Clerk II-Quality Control (2)
Budget Category, FINAL Recommendation and Comments			
FINAL Budget Department Category	FINAL RECOMMENDATION for Funding	Comments (if any)	
F-Supported	Supported	Probate department received their first QC Clerk in FY 2026. While probate cases have not increased at the rate of civil cases (department is also requesting a Civil QC Clerk), the documents QC'd in Probate are comparable to the Civil workload. Stats support an additional position to keep up with the workload.	
WHY is this position needed?			
The Probate/Mental Health office is requesting two quality control clerks (533) in order to support the Probate/Mental Health Court. There has been a significant increase in Probate and Mental Health cases over the years and to ensure all documents filed into the cases are accurate quality control was established. Currently, one Deputy County Clerk II has been completing all tasks of the quality control position. Statistics stipulate with the increase in case filings and additional documents an increase of three quality control clerks is required for this area.			
HOW will this position benefit your office and/or the County?			
The Probate/Mental Health office is requesting two quality control clerks to ensure that all official documents are properly reviewed for accuracy in a timely and efficient manner. This position would be required to review all documents two times to ensure quality documents are in the case management system. The position would be required to follow all established business processes.			

Is there statutory authority for this request?		Will this generate revenue?		If Yes, potential amount?	
Job Duties of NEW Position					
The Quality Control Clerk is required to enter the job identification numbers and date for the eFile, queue and disposition reports into the appropriate spreadsheet. The clerk will review all documents for legibility and to ensure each document submitted is imported into Odyssey correctly. The Quality Control Clerk is to ensure fees were assessed properly and correct filing codes transferred into Odyssey. Clerk is required to verify event entries match documents filed, verify if the document contains sensitive data and the security of the document, and verify that party information has been updated accordingly. When reviewing guardianship cases, clerk will ensure that an ad litem has been appointed when required, proper background checks and certification training have been completed, the disposition and statistical closure are correct, any necessary reporting has been completed and documents have been mailed or email to proper parties. When reviewing probate cases, clerk will ensure that abstracts for voter's registration have been completed, all publication notices have been posted, ad litem has been appointed when required, and the original will has been filed into the case. The Quality Control clerk will review mental health cases to ensure all documentation from the hospitals are completed properly according to statute, mental health warrants for proper signature, all court related documents are properly filed into the case and all time frames have been met. The Quality Control Clerk would be responsible to run the dismissal report to verify that all attorney fees have been assessed properly and removed when required and that all dispositions are proper. When Court Registry is processing a disposed case, clerk will review all orders to ensure that an Order to Deposit/Release has been processed and sent with appropriate required information to the County Clerk's office. The clerk will follow the set guidelines for the paperless process ensuring the reports are placed in their appropriate folders and properly named. All errors found are to be entered into the audit spreadsheet by the end of the day. Any financial discrepancies are to be sent to the supervisor immediately. Clerk is responsible for the storing of all documents located in the quality control folders. When all documents have been reviewed for first and second checks, the documents are to be labeled by date and boxed by month and then placed in the storage room. Clerk is responsible for backing up probate and mental health in the absence of a clerk. The Quality Control Clerk is responsible for providing support to probate/mental clerks by ensuring all orders, case filings, answers, request for citations, and request for letters are filed accurately and follow the established procedures. When a filing is accepted, ensure that all documents are entered into Odyssey correctly including filing type, party information and attorney information. Clerk will accurately assess any required fees and process payments for any new filing, citation, and service. All funds received are to be accurately deposited into the appropriate fee account on same day received. When processing deposits relating to the court registry account, a certified copy of the court order and a properly completed registry deposit or withdrawal sheet is to be forwarded to the court registry clerk on same day transaction was processed. When processing requests to withdrawal funds, clerk is responsible for completing the accurate withdrawal information form. All withdrawal forms are forwarded to the court clerk upon completion. Clerk is responsible for reviewing the event listing report and paper folders. The clerk will follow the set guidelines for the paperless process when ensuring the reports are placed in their appropriate folders and properly named. Clerk is responsible for providing excellent customer service at all times to internal and external customers whether on the phone, in person, or if correspondence is received by mail. Clerk will conduct him/herself in a professional manner at all times. The clerk will list each completed event listing report on the appropriate spreadsheet located in the shared drive. The information listed should include the report date, the number of documents reviewed, number of images reviewed, and the report identification number. The spreadsheet should be updated within one business day of completion of the report, with no more than two deadlines missed. All errors will be entered on the clerk's audit sheet along with the document date, clerk who accepted/entered the document and the type of error found. Any errors involving financials must be sent to the supervisor via email immediately. At end of day, clerk is responsible for accurately balancing their till following established balancing procedures. Clerk is responsible for properly running daily balancing reports, completing deposit forms and scanning checks into correct fee account. Clerk is responsible for verifying other clerks' till and tape. Clerk is to ensure all reports, deposit slips and bags are legible and all required documentation is scanned properly for bookkeeper's review. Clerk is responsible for ensuring Odyssey till is closed and reconciled. Clerk is responsible for all cash and checks and will be responsible for any shortages. All funds are to be secured daily in vault until delivery to armored car pick-up location. Clerk is responsible for creating daily deposit report in Laserfiche. Submit Laserfiche scan to supervisor for review no later than 3 days from deposit date.					

NEW POSITION(S) REQUEST										
Requested Position Title	Requested Quantity	Requested Grade	Part-Time (20 hrs.) Full-Time (40 hrs.)	Requested Salary Per Position	Total Estimated Amount with Benefits	CORRECTED Salary	CORRECTED Position Title/Grade (match to job duties detailed above)	CORRECTED Salary with Benefits	FY 2027 Supported Quantity	FY 2027 Supported Amount
Deputy County Clerk II	2	533	Full-Time	\$48,287.00	\$159,978.00	\$48,287.00	Deputy County Clerk II/ 533	\$159,978.00	1	\$79,989.00
Requested NEW Position(s) Subtotal:					\$159,978.00	CORRECTED New Position(s) Subtotal:				
						SUPPORTED New Position(s) Subtotal:				
						\$79,989.00				

TRAINING INCREASE REQUESTS								
Name of Attendee	Purpose for Conference Attendance (CLE, CE, etc. as required)	Estimated Travel Expense*	Requested Quantity	Total Requested	Budget Dept. Comments	Supported Amount	FY 2027 Supported Quantity	FY 2027 Supported Total
TBD	Continuing Education	\$3,000.00	2	\$6,000.00	Department historically has leftover funds in training each year.	\$500.00	1	\$500.00
TBD	In-House Training	\$500.00	2	\$1,000.00		\$500.00	1	\$500.00
*Include registration, mileage, airfare, hotel, taxi/Uber/Lyft, airport parking, hotel parking, per diem, etc.		Training Requested Subtotal:		\$7,000.00		Supported Training Subtotal: \$1,000.00		

MAINTENANCE/OPERATIONS EXPENSES (SUPPLIES, DUES, MAINTENANCE, ETC):				
Account Description	Details	Amount Requested	Budget Dept. Comments	Supported Amount
01-08060-0001-44-30-0000-61551	Dues and Subscriptions	\$1,500.00	Department historically has leftover funds in M&O each year.	\$500.00
0001-08060-0001-44-30-0000-61510	Office Supplies	\$1,500.00		\$500.00
M&O Requested Subtotal:		\$3,000.00		Supported M&O Subtotal:
				\$1,000.00

FY 2027 Department Funding Request for a NEW Position

Department/Program #	Department Name / Program				Priority #	Department Improvement Title					
08060-0001	08060 - COUNTY CLERK PROBATE/MENTAL/0001 - ADMIN				1	Deputy County Clerk II-Quality Control (2)					
FURNITURE, EQUIPMENT, TECHNOLOGY, ONE-TIME PURCHASES (ITEMS THAT NEED TO BE PRICED)											
		Quantity Requested	User Name and/or Job Title	Estimated Unit Cost	Estimated Total Requested	Unit Cost Provided by Purchasing	Updated Item Description (if applicable)	Supported Quantity	FY 2027 Supported Amount	FY 2026 Recommended Amount	
Cubicle Package	New	2		\$14,000.00	\$28,000.00	\$14,000.00	Cubicle Package	1	\$14,000.00	\$0.00	
Computer-Desktop	New	2		\$1,592.00	\$3,184.00	\$2,630.00	Computer-Desktop	1	\$2,630.00	\$0.00	
Desk Phone	New	2		\$597.00	\$1,194.00	\$597.00	Desk Phone	1	\$597.00	\$0.00	
Destop Scanner	New	2		\$999.00	\$1,998.00	\$999.00	Destop Scanner	1	\$999.00	\$0.00	
Software-Adobe Pro	New	2			\$0.00	\$130.00	Software-Adobe Pro	1	\$130.00	\$0.00	
Software-EA	New	2		\$624.00	\$1,248.00	\$624.00	Software-EA	1	\$624.00	\$0.00	
Odyssey	New	2			\$0.00	\$0.00	Odyssey	1	\$0.00	\$0.00	
		Estimated Requested Equipment Subtotal:			\$35,624.00			Recommended Equipment Subtotal:		\$18,980.00	\$0.00
		Total Estimated Department Request:				\$205,602.00			Updated Total Department Request:		\$207,938.00
						SUPPORTED Total Department Request Utilizing FY 2027 Funds:					\$100,969.00
						RECOMMENDED Total Department Request Utilizing FY 2026 Funds:					\$0.00

ANALYSIS							
Q & A Discussions with Department							
Sent To:	Date Sent	Comment	Date Received	Responder's Name	Comment		
Brenda G.	3/27/2026	Email	3/27/2026	Brenda G.	Email		
Questions TO Department			Response From Department				
An employee chair already comes with the cubicle package. I will be removing the chair listed on the request.			Sure				
Do you have space in your office for two new positions?			Yes				
Statistical Analysis							
STATISTICS RELATED TO NEW POSITION REQUEST							
ALL PROBATE /MENTAL DOCUMENTS QC'D AS REPORTED BY COUNTY CLERK							
Fiscal Year	Total Documents QC'D	# of Employees	# Per Employee	% Change per Employee	Comments / Findings		
FY 2018	95,858	0	#DIV/0!		No Clerk dedicated to QC prior to FY 2026. Probate Administrator had been performing these duties on top of their other tasks.		
FY 2019	114,512	0	#DIV/0!	#DIV/0!			
FY 2020	75,920	0	#DIV/0!	#DIV/0!			
FY 2021	79,309	0	#DIV/0!	#DIV/0!			
FY 2022	64,282	0	#DIV/0!	#DIV/0!			
FY 2023	71,346	0	#DIV/0!	#DIV/0!			
FY 2024	95,834	0	#DIV/0!	#DIV/0!			
FY 2025	107,484	0	#DIV/0!	#DIV/0!			
FY 2026 as of 2nd Quarter	64,913	1			Adopted (1) Deputy Clerk II - QC in FY 2026		
FY 2026 Year-End Estimate	111,279	1	111,279	#DIV/0!			
Fiscal Year	Total Documents QC'D	# of Employees Requested	Total # of Employees Requested	# Per Employee	% Change per Employee	Estimated % Change in Stat	Comments / Findings
FY 2027 Estimate THIS Request	132,596	2	3	44,199	-60.3%	19.2%	

Fiscal Year	Total Documents QC'D	# of Employees Recommended	Total # of Employees Recommended	# Per Employee	% Change per Employee	Comments / Findings				
FY 2027 Estimate Recommended	132,596	1	2	66,298	-40.4%					
# Probate Documents QC'D - using average of 2 minutes (as provided by department)										
	FY 2018	FY 2019	FY 2020	FY 2021	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026 Estimate	FY 2027 Estimate
Documents QC'D	95,858	114,512	75,920	79,309	64,282	71,346	95,834	107,484	111,510	132,596
Total Hours Per Year	3,195	3,817	2,531	2,644	2,143	2,378	3,194	3,583	3,717	4,420
Hours Worked Per Position in a Year	2,080	2,080	2,080	2,080	2,080	2,080	2,080	2,080	2,080	2,080
Budgeted Positions for Probate QC	0	0	0	0	0	0	0	0	1	1
Estimated Positions Needed	2	2	1	1	1	1	2	2	2	2

FY 2027 Department Funding Request for a NEW Position

Department/Program #	Department Name / Program				Priority #	Department Improvement Title		
08060-0001	08060 - COUNTY CLERK PROBATE/MENTAL/0001 - ADMIN				1	Deputy County Clerk II-Quality Control (2)		
PROBATE CASES FILED								
Fiscal Year	Probate Cases Filed	# of Employees	# Per Employee	% Change	Comments / Findings			
FY 2018	4,985	0	#DIV/0!					
FY 2019	4,446	0	#DIV/0!	-10.8%				
FY 2020	3,873	0	#DIV/0!	-12.9%				
FY 2021	4,546	0	#DIV/0!	17.4%				
FY 2022	4,453	0	#DIV/0!	-2.0%				
FY 2023	4,345	0	#DIV/0!	-2.4%				
FY 2024	4,249	0	#DIV/0!	-2.2%				
FY 2025	4,773	0	#DIV/0!	12.3%				
FY 2026 as of 2nd Quarter	2,508	1			Adopted (1) Deputy Clerk II - QC in FY 2026			
FY 2026 Year-End Estimate	5,016	1	5,016	5.1%				
Fiscal Year	Probate Cases Filed	# of Employees Requested	Total # of Employees Requested	# Per Employee	% Change per Employee	Estimated % Change in Stat	Comments / Findings	
FY 2027 Estimate THIS Request	5,145	2	3	1,715	-65.8%	2.6%		

Fiscal Year	Probate Cases Filed	# of Employees Recommended	Total # of Employees Recommended	# Per Employee	% Change per Employee	Comments / Findings
FY 2027 Estimate Recommended	5,145	1	2	2,572	-48.7%	

CATEGORY TRENDS (LESS ONE-TIME)						
TRAINING & TRAVEL						
Fiscal Year	Adopted Amount	% Change in BUDGET	Actuals	% Change in ACTUALS	Difference in Budget vs Actual	Comments / Findings
FY 2018	\$7,175		\$4,656.36		\$2,518.64	
FY 2019	\$7,175	0.0%	\$2,923.72	-37.2%	\$4,251.28	
FY 2020	\$9,500	32.4%	\$113.85	-96.1%	\$9,386.15	
FY 2021	\$9,500	0.0%	\$1,249.14	997.2%	\$8,250.86	
FY 2022	\$9,500	0.0%	\$3,720.98	197.9%	\$5,779.02	
FY 2023	\$7,700	-18.9%	\$2,681.02	-27.9%	\$5,018.98	
FY 2024	\$7,700	0.0%	\$359.00	-86.6%	\$7,341.00	
FY 2025	\$7,700	0.0%	\$3,945.20	998.9%	\$3,754.80	
FY 2026 as of May 11, 2026	\$7,700	0.0%	\$1,377.70		\$6,322.30	
FY 2026 Year-End Estimate	\$7,700	0.0%	\$1,944.99	-50.7%	\$5,755.01	
Fiscal Year	FY 2027 Base	Request Amount	New Total	% Change from YE Estimate	% Change from FY 2026 Adopted	Comments / Findings
Total FY 2027 Base plus this Dept. Request	\$7,700	\$7,000	\$14,700	655.8%	90.9%	

CATEGORY TRENDS (LESS ONE-TIME)						
M&O						
Fiscal Year	Adopted Amount	% Change in BUDGET	Actuals	% Change in ACTUALS	Difference in Budget vs Actual	Comments / Findings
FY 2018	\$312,683		\$309,485.48		\$3,197.52	
FY 2019	\$458,163	46.5%	\$357,791.13	15.6%	\$100,371.87	
FY 2020	\$95,838	-79.1%	\$68,496.41	-80.9%	\$27,341.59	Multiple lines moved to Probate Court budget
FY 2021	\$17,838	-81.4%	\$3,770.81	-94.5%	\$14,067.19	Psych Eval moved to Probate Court budget
FY 2022	\$17,838	0.0%	\$5,675.79	50.5%	\$12,162.21	
FY 2023	\$14,338	-19.6%	\$6,486.40	14.3%	\$7,851.60	budget reduced in budget workshop
FY 2024	\$24,338	69.7%	\$13,297.74	105.0%	\$11,040.26	adopted \$10,000 for printed materials
FY 2025	\$24,338	0.0%	\$12,484.26	-6.1%	\$11,853.74	
FY 2026 as of May 11, 2026	\$29,055	19.4%	\$17,330.28		\$11,724.72	
FY 2026 Year-End Estimate	\$29,055	19.4%	\$24,466.28	96.0%	\$4,588.72	
Fiscal Year	FY 2027 Base	Request Amount	New Total	% Change from YE Estimate	% Change from FY 2026 Adopted	Comments / Findings
Total FY 2027 Base plus this Dept. Request	\$24,338	\$3,000	\$27,338	11.7%	-5.9%	

FY 2027 Department Funding Request

Department/Program #	Department Name / Program	Priority #	Department Improvement Title		
08060-0001	08060 - COUNTY CLERK PROBATE/MENTAL/0001 - ADMIN	2	Tyler AI Document Automation		

Budget Category, FINAL Recommendation and Comments		
FINAL Budget Department Category	FINAL RECOMMENDATION for Funding	Comments (if any)
G-Not Supported	Not Recommended	Duplicate request. This is also a request in the County Court at Law Clerks packet.

WHY is this request needed?

As Collin County continues to experience rapid and sustained growth, so do the Probate/Mental Office in the number of filings they receive and are required to process each year. Currently, filing intake and handling are manual processes requiring complete human intervention, even when filings are received electronically. Staff are required to review documents, verify completeness, classify case types, extract key data elements, assign docket codes, and route items to the appropriate Courts or division. These repetitive, rules-based tasks consume a significant portion of clerk's time and introduce opportunities for human error, processing delays, and inconsistent data quality. Absent technological intervention, continued population growth will necessitate additional full-time clerk positions in order to maintain statutory processing timeline and service levels.

WHAT are you requesting?

The Probate/Mental Office is requesting an AI-enabled document automation solution provided by Tyler Technologies. This solution intends to deploy a secure, government-compliant AI platform capable of:

- Automatically ingesting electronic and scanned paper filings
- Classifying document types based on learned patterns and defined business rules
- Extracting structured data fields
- Validating required elements and flagging exceptions
- Routing documents to appropriate queues or Odyssey workflows
- Generating audit logs for transparency, traceability, and compliance

This system will operate under human-in-the-loop oversight, ensuring clerk review of exceptions and maintaining accountability for official records. The initiative will not replace statutory authority or decision-making functions of Clerk staff. Rather, it will automate high-volume, repetitive processing steps that currently consume staff capacity. The solution is offered with unlimited processing resources - meaning an unlimited number of document pages on an annual basis. It also includes unlimited docket code configuration within the included number of professional services hours provided in the investment summary.

HOW will this benefit your office and/or the County?

- Improved processing timeliness
- Enhanced data accuracy and consistency
- Staff redeployment to high-value functions
- Scalability for future growth
- Lower error-correction and rework costs
- Increased operational productivity per employee

Funding this initiative will modernize critical public-facing operations, enhance transparency and data integrity, and ensure the County remains scalable, efficient, and responsive to continued growth.

Is there statutory authority for this request?	LGC 191.001; 192.006 and 195	Will this generate revenue?	It could be argues that it can indirectly through workload obsorption and redeployment of existing staff	If Yes, potential amount?	Based off comparisons from other Counties using AI, there is a repurposed of staff or no additional staff needed
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FURNITURE, EQUIPMENT, TECHNOLOGY, ONE-TIME PURCHASES (ITEMS THAT NEED TO BE PRICED)										
Item Detailed Description	New / Replace	Quantity Requested	User Name and/or Job Title	Estimated Unit Cost	Estimated Total Requested	Unit Cost Provided by Purchasing	Updated Item Description (if applicable)	Recommend Quantity	FY 2027 Recommend Amount	Recommend FY 2026 Amount
Tyler AI Document Automation (Year 1)		1		\$172,750.00	\$172,750.00	\$190,025.00		0	\$0.00	\$0.00
County Clerk Implementation and Configuration (Year 1)		1		\$71,250.00	\$71,250.00	\$156,695.00		0	\$0.00	\$0.00
		Estimated Requested Equipment Subtotal:					Recommended Equipment Subtotal:		\$0.00	\$0.00
		Total Estimated Department Request:					Updated Total Department Request:		\$346,720.00	
						RECOMMENDED Total Department Request Utilizing FY 2027 Funds:		\$0.00		
						RECOMMENDED Total Department Request Utilizing FY 2026 Funds:		\$0.00		

ANALYSIS					
Q & A Discussions with Department					
Sent To:	Date Sent	Comment		Responder's Name	Comment
Brenda G.	3/27/2026	Email	3/27/2026	Brenda G.	Email
Questions TO Department			Response From Department		
This same item was requested in your CCL packet. Since there is an unlimited number of processing resources - could this be one request with one cost? Is there a need to duplicate this request for CCL and Probate? Could the one implementation not cover both?			Yes, it would be one overall implementation and service cost.		

Q & A Discussions with IT					
Sent To:	Date Sent	Comment		Responder's Name	Comment
Questions to IT			Response From IT		
This same item is requested in the County Clerk - County Court at Law Clerks packet. Since there is an unlimited number of processing resources - could this be one request with one cost? Is there a need to duplicate this request for CCL and Probate? Could the one implementation not cover both?			BW - Yes, this would be included in the same contract and pricing offered by Tyler for both the District Clerk and County Clerk. The investment summary identifies unlimited docket codes and bot configuration within the limits of professional services hours included in the pricing. If the County Clerk wants to use those hours towards probate case types, it will be up to her.		
Would IT assist in the implementation of this new platform?			BW - This would be assigned to the AI Program Manager position requested in the FY27 budget.		
If yes, does IT have the bandwidth to work on this project?			BW - Yes, assuming IT is given the AI Program Manager position requested in the FY27 budget.		
Does IT have any concerns about this request?			BW - The number of AI budget requests in this year's - and assuming future years - dictates the need for AI program governance and control.		
Anything else we may need to know about this request - or things to add for Purchasing to price?					