Interstate Commission for Adult Offender Supervision

Technology Committee Meeting Minutes

May 28, 2026 · 11:00 AM ET · Teleconference · APPROVED

MEMBERS IN ATTENDANCE

1. Chris Moore (GA), Chair
2. Andrew Zavaras (CO), Commissioner
3. Melissa Smith (IL), Commissioner
4. Steve Turner (KY), Commissioner
5. Mac Pevey (WA), Commissioner
6. Shyra Bland (NJ), Ex-Officio
7. Kelly Palmateer (NY), Ex-officio
8. Jessica Cook (UT), Ex-officio

MEMBERS NOT IN ATTENDANCE

1. Taryn Link (AK)

STAFF

1. Ashley Lippert, Executive Director
2. Barno Saturday, Logistics Coordinator
3. Mindy Spring, Operations Manager
4. Suzanne Brooks, Education and Implementation Manager
5. Xavier Donnelly, System Manager
6. Drake Greeott, Web Development Manager

CALL TO ORDER

Chair C. Moore (GA) called the meeting to order at 11:00 am ET. Five voting members were present; a quorum was established.

APPROVAL OF AGENDA AND MINUTES

A motion by Commissioner A. Zavaras (CO) to approve the meeting agenda was adopted.

A motion by Commissioner S. Turner (KY) to approve the previous meeting minutes was adopted.

DISCUSSION

Revised INSITE Privacy & Data Quality Policy: The committee reviewed the revised INSITE Privacy and Data Quality Policy and the recommendation to archive Policy 4-2009 because it was incorporated into the new policy.

Operations Manager M. Spring presented the key changes to the revised policy: incorporates user access and data quality standards, clarifies state responsibilities and data ownership. In addition, she introduced a new self-assessment checklist for states to use when onboarding new DCAs or reviewing internal compliance. Upon logging in to INSITE, states will be asked to accept the revised policy.

Commissioner S. Turner (KY) noted he had reviewed the policy and checklist and found both to be well-constructed with no concerns.

DCA K. Palmateer (NY) asked how the five-year photo update requirement would be monitored and managed, particularly for receiving states supervising individuals for longer than five years.

System Manager X. Donnelly confirmed that compliance would be addressed through periodic external audits similar to those conducted in previous years.

Executive Director A. Lippert confirmed that regular INSITE audits, including photo and user audits, will be conducted approximately every three to five years and suggested that photo management could be explored as a future enhancement.

DCA K. Palmateer (NY) asked whether high-profile cases that do not qualify for witness protection but warrant removal from the public portal could still be concealed.

Executive Director A. Lippert confirmed that such cases would fall under the safety considerations language in the policy.

Operations Manager M. Spring clarified that the recommendation to archive Policy 4-2009 is because that policy was created when concealment from the public web portal was a manual process managed by the national office. State administrators now have direct ability.

A motion by Commissioner M. Pevey (WA) to recommend the Executive Committee approve the revised INSITE Privacy & Data Quality Policy, including the archival of Policy 4-2009, was adopted.

Revised Enhancement Policy (2018-2), Enhancement Request Form, and Technology Committee Scoring Rubric: Operations Manager M. Spring presented the revised enhancement policy, updated enhancement request form, and a new Technology Committee scoring rubric. The enhancement policy has been substantially rewritten to improve the screening process and increase national office involvement in early-stage enhancement discussions. The revised request form is designed to focus on problem-solving, user impact, and intended outcomes rather than simply describing desired features. A Technology Committee scoring rubric has also been developed to help prioritize enhancement requests based on user impact and system benefit. Pending the Executive Committee's approval, the national office plans to schedule state outreach sessions on policy updates later in the summer.

Executive Director A. Lippert clarified that the Technology Committee would conduct the scoring to ensure objectivity.

Commissioner S. Turner (KY) noted that enhancement costs can be significant and asked whether cost would factor into the rubric. Executive Director A. Lippert explained that the rubric is intended to determine whether an enhancement is worth pursuing a formal cost quote, which avoids the burden of requesting quotes for lower-priority items. Cost would be factored in after a rubric review confirms an enhancement is worth pursuing, with final approval following receipt of a detailed cost proposal.

Commissioner M. Smith (IL) recommended that the enhancement request process not be opened too quickly after the November 2 INSITE launch, as users will need time to adjust to the new system before submitting enhancement requests.

A motion by Commissioner A. Zavaras (CO) to recommend the Executive Committee approve the revised Enhancement Policy, the updated Enhancement Request Form, and the Technology Committee Scoring Rubric was adopted.

OLD/NEW BUSINESS

INSITE User Acceptance Testing Update: System Manager X. Donnelly reported that the first phase of user acceptance testing (UAT) with the JAD Group has been completed. A total of 139 testing modules were reviewed. Only minor bugs were identified; all have been tabulated and submitted to Optimum for resolution. Overall feedback was positive, with users noting that INSITE is reminiscent of ICOTS but offers a more streamlined and user-friendly interface, consolidating information that previously required navigating multiple screens.

Commissioner S. Turner (KY) shared that he participated in the UAT and was genuinely impressed by the new system's layout and functionality. He noted that staff members he informally previewed the system to were immediately put at ease, as the interface was familiar enough to reduce concerns about a steep learning curve.

JAD member J. Cook noted the system has a clean and modern appearance that is easier to use than ICOTS. System Manager Donnelly also reported a well-attended INSITE "Tuesday Takeaway" session held the week of the meeting, during which the system was demonstrated in the prep environment to positive reception. Phase 2 UAT, which will include more business logic and compact activities, is scheduled to begin in early July with a broader group of end users. System Manager Donnelly extended appreciation to all JAD Group members for their contributions over the past year and a half of development and testing.

INSITE Data Retention Survey Results: System Manager X. Donnelly presented the results of the data retention survey, which received 42 state responses. All 42 responding states have a data retention policy. Only 8 of 42 respondents differentiate retention periods between felony and misdemeanor records. Given the low response rate supporting this differentiation, and because some states do not supervise misdemeanors under compact, the committee agreed not to differentiate by offense type. The majority of states retain data either indefinitely or in the 6–10 year range.

System Manager Donnelly clarified that the data retention policy will govern the archiving of attachments on closed or withdrawn cases, not the deletion of compact data. Core compact data, including transfer records, progress reports, and violation reports, will remain active and fully accessible in the INSITE database regardless of retention period. Archived attachments would be moved to long-term storage at significantly reduced cost and would remain retrievable.

Commissioner S. Turner (KY) suggested exploring whether cases closed due to the supervised individual's death could be moved to long-term storage earlier than the standard retention period, as a potential additional cost savings.

Commissioners S. Turner (KY) and M. Smith (IL) both expressed support for a 10-year retention period as a practical and appropriate starting point, noting that states already retain records digitally in their own systems.

A motion by Commissioner S. Turner (KY) to recommend the Executive Committee to set the INSITE data retention for attachments on closed and withdrawn cases at 10 years, after which such attachments would be archived to long-term storage, was adopted.

ABM Expo Tables: Chair C. Moore (GA) noted that expo tables will be featured at the 2026 Annual Business Meeting and asked Technology Committee members to consider volunteering to staff the committee's table.

Executive Director A. Lippert advised that the national office would prepare informational handout sheets for each committee's table, covering the committee's work, current priorities, and how to get involved. QR codes will also be available at the tables for attendees to express interest in joining committees.

ADJOURN

The committee adjourned at 11:49 am ET.