

**Judicial Information Systems Council
Online Access Subcommittee
Draft Meeting Minutes
James Noel, Chair**

Judicial Information Division
2905 Rodeo Park Drive East, Building 5
Santa Fe, New Mexico 87505

Monday, December 7, 2020 at 1:30pm – remote conference

1. Welcome and Introductions

In accordance with the Supreme Court orders regarding the pandemic and the imperative to make court access the top priority while operating under scaled back operations, for the foreseeable future the focus of the Online Access Subcommittee meetings will be on the following three items until further Order of the Court.

- SOPA Access Requests
- re:SearchNM completion
- Expanded e-Filing

In Attendance: Judge Noel, Chair; Barry Massey, Weldon Neff, Judge Mitchell, Judge Vega, Dick Wilkinson, Judge Dominguez, Celina Jones, Joey Moya, Ian Bezpalko, Artie Pepin, Justice Thomson, Judge Sedillo, Rachelle Klump, Suzanne Winsor, Tobie Fouratt, Margarita Terrell, Jennifer Scott, Laura Orchard

2. Approval of Agenda

The motion to approve the agenda made by Judge Dominguez was seconded by Ian Bezpalko, and passed without objection.

3. Approval of November 2, 2020 draft minutes

The motion to approve the draft minutes made by Judge Dominguez was seconded by Judge Vega, and passed without objection.

4. Follow up on action items from November 2 meeting (see attached)

Laura Orchard noted the two outstanding action items from the prior meeting, which are currently in process.

5. Magistrate and Metropolitan Courts E-Filing Projects – Suzanne Winsor, Margarita Terrell
- a. Supreme Court request for a discussion of Task Manager as alternative to email for Judge's signature on proposed text documents (Justice David Thomson)
 - b. Metropolitan Court determination on Task Manager solution (Judge Maria Dominguez)
 - c. Magistrate Court determination on Task Manager solution (Judge Mickie Vega)

Judge Noel provided context for the discussion. A question that arose during implementation of eFiling for Metropolitan and Magistrate Courts is how proposed text orders get in front of Metropolitan Court judges and Magistrate Court judges when using eFiling. It was presumed

that it would be similar to the District Court process, where the proposed text orders get submitted by the attorney through the proposed text email address.

Justice Thomson suggested that it would be good for the Supreme Court to have the modified rule language to discuss at their December 9 conference in order to have a rule in place for the January roll out.

Judge Noel offered to convene a subgroup to craft a rule recommendation to submit to the Supreme Court.

Action Items:

- *Judge Noel to schedule a meeting with Judge Sedillo, Judge Domiguez, Judge Vega, Joey Moya, Suzanne Winsor, and Margarita Terrell to draft rule language*
 - *Justice Thomson to raise the topic with the Supreme Court on December 9 and expect draft language from Joey within 10 days*
 - *Justice Thomson would like a demo with Judge Sedillo, Judge Vega, and Suzanne Winsor of the proposed text process using Odyssey Task Manager*
6. Review policies, criteria, and exclusion/inclusion spreadsheets for any adjustments (Joey Moya, Celina Jones, Rachelle Klump)

Laura Orchard guided the committee through a review of the guiding documents for providing SOPA access to users, both to reflect the DV case types having been moved to Tier 1 and for clarity. Discussion ensued around each item.

Policies and Criteria -

Laura Orchard presented questions to the committee regarding Policies and Criteria:

- *Policy 1 – is missing a statement about the attorney needing to be active status and have a CAID number. Joey Moya provided clarity on the status of attorneys.*
 - *Artie Pepin made a motion to add the sentence, “...where their attorney has a CAID number in either “active” or “inactive” status (not including disbarred, deceased, withdrawn, or suspended.)”, Judge Dominguez seconded, and it passed without opposition.*
- *Policy 4 – this policy can be eliminated, as it deals only with DV cases*
- *Policy 5 – this policy can be eliminated, as it deals with DV cases and the contractors are addressed in Policy 2.*
 - *Artie Pepin made a motion to eliminate Policies 4 and 5, Judge Dominguez seconded, and it passed without opposition.*
- *Policy 7 – for clarity, replace the words “attorney staff” with “their staff”*
 - *Artie Pepin made a motion to replace the words “attorney staff” with “their staff”, Judge Dominguez seconded, and it passed without opposition.*
- *Policies 10, 12, and 14 – these policies can be eliminated, as they deal only with DV cases*
 - *Judge Mitchell made a motion to eliminate these policies, Artie Pepin seconded the motion, and it passed without opposition.*
- *Criteria 1, 4, 5, and 8 – these policies can be modified to remove the DV language, which would mean Policy 5 can be eliminated.*

- *Weldon Neff made a motion to eliminate criteria 5 and modify criteria 1, 4, and 8 to remove domestic violence language, Barry Massey seconded, and it passed without opposition.*
- *Criteria 2 – implementing the criteria is burdensome for the applicant and JID Service Desk staff to carry out, so modification of this criteria is recommended.*
 - *Dick Wilkinson made a motion to add more explicit language on the application form for an attorney requesting access to children’s court cases declare they are representing juveniles in criminal or delinquency cases, Weldon Neff seconded, and it passed without opposition.*

Action Items:

- *Laura Orchard to update the Criteria spreadsheet to reflect the motions made by the committee*

Exclusion-Inclusion Spreadsheet -

Laura Orchard presented questions to the committee regarding details in the spreadsheet that would be impacted by moving the DV case types and the Parentage case type to Tier 1:

- *Domestic Matters (Conversion Only) and Domestic Relations (Conversion Only) case types, which were obsoleted in 2008. They had been included in the higher tier with DV case types, but contain no events or documents, so the recommendation is to move them into Tier 1 with the DV case types.*
 - *Barry Massey made a motion to move both to Tier 1 and to mirror the DVL access on Case Lookup and the Court Kiosk, Weldon Neff seconded the motion, and the motion passed without opposition.*
 - *Because some of these cases have been reopened and retain the obsolete case type, look into possibly changing the case type [on reopened ZDM ZDR case types – there are 21] – show to Judge Noel and Rachelle Klump either at the January meeting or an interim meeting.*
- *All Domestic Violence case types availability in columns F, G, and H need to be updated based on the DV case types moving to Tier 1 (N, Y, Y)*
- *Other details were noted by Barry Massey and Joey Moya, to be sent to Laura Orchard by email.*

Other Issues from JID Service Desk Staff –

- *GALs cannot always gain AOR access due to being entered on the case as representing a participant*
 - *This issue was not reproducible in JQ or PQ cases during the meeting, so Laura will research Solar Winds to find the exact cases where this is an issue.*
 - *Suzanne Winsor suggested a new profile to resolve this issue*
 - *Possibly the court staff is entering the GAL incorrectly? Judge Noel indicated that in DM cases, the GAL is entered as the participant, not an attorney on the case, so there are multiple correct ways to enter GALs on the case.*
 - *No work around for participant GALs*
- *All other items from the JID Service Desk staff are resolved by moving DV cases to Tier 1*
 - *OAS exceptions (both pre-covid and pandemic)*

- *Definition of Law Enforcement doesn't include detention center employees*
- *Adult Probation and Parole – no policy written to restrict CC cases from them*

Action Items:

- *Update other alignment changes on the Exclusion-Inclusion spreadsheet that were discussed and that will be sent by Joey Moya and Barry Massey*
- *Provide all of the updated spreadsheets, application forms, etc. for OAS approval at the January meeting*
- *Laura Orchard to provide ZDM/ZDR data to Judge Noel and Rachelle Klump*

7. January meeting date recommendation Monday, January 11 at 1:30pm

Action Item:

- *The next meeting will be Monday, January 11, followed by Monday, February 1*

8. Meeting Adjourned

Next Meeting

TBD