

**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, June 1, 2020 at 1:30pm – remote conference

1. Welcome and Introductions

*In attendance: Judge Noel, Jen Scott, Joey Moya, Barry Massey, Weldon Neff, Ian Bezpalko, Judge Mitchell, Artie Pepin, Dick Wilkinson, Suzanne Winsor, Laura Orchard, Margarita Terrell*

*Judge Noel reminded the committee that, 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*

2. Approval of Agenda

*Artie Pepin moved to add an executive session to the agenda after the approval of the minutes. Judge Mitchell seconded the motion, which passed with no opposition.*

3. Approval of May 4, 2020 minutes

*Judge Noel noted a typo of “suite” instead of “suit” and asked Weldon Neff about the CEOC action items. Weldon said the CEOC has not met, so these action items will remain as pending on the July OAS agenda*

*Artie Pepin moved to approve the minutes as amended, and Judge Mitchell seconded the motion, which passed without opposition.*

*Action Items:*

- *Laura Orchard to correct the typo; and,*
- *Carry the CEOC action items to the July 6 OAS agenda*

4. Update on e-File Implementation Plans Presented to the Supreme Court

*Joey Moya reported that the Supreme Court has approved the Metro e-Filing Implementation Plan and JID can proceed with that project.*

*He indicated the Court had three questions regarding the Magistrate e-Filing Implementation Plans and Laura Orchard walked the committee through the draft answers the Court would like to have submitted via a cover memo at their next conference.*

*1. Supreme Court Rule: Judge Mitchell moved to accept the answer as written to recommend Option 1, and Artie Pepin seconded the motion, which passed with no opposition.*

*Joey explained that the timing for getting the Rule to the Supreme Court will be about 45 days prior to the voluntary filing start date. So if Metro is slated to go live on a voluntary basis in September, the proposed Rule should go before the Supreme Court at their August 12 conference, which has a July 29 deadline for the agenda materials.*

*2. Impacted Court Locations: Judge Mitchell moved to accept the answer as written, and Weldon Neff seconded the motion, which passed without opposition.*

*3. Concurrent or Subsequent Roll Out: Joey clarified that the Court's question was not about whether the projects could be implemented simultaneously, but what the implementation timeframe looked like for both Metro and Magistrate.*

*Action Items:*

- *Laura will rewrite a short description that includes Metro taking 3 months to roll out, Magistrate taking 7 months to roll out, and a handful of Magistrate data administration tasks that can be worked on during the Metro roll out. This new answer will be sent to Judges Noel and Mitchell for review prior to the cover memo being sent to the Supreme Court for their next agenda.*
- *Margarita Terrell will prepare to submit the Metro Supreme Court Rule for the August 12 Supreme Court conference agenda before July 29.*

5. SOPA Requests (see "SOPA Request" folder)
  - a. Lori Ridgway – T2 non-officer law enforcement applicant

*Laura Orchard explained that the criteria spreadsheet only provides Tier 2 Law Enforcement profiles to staff of LEAs in order to provide for officer safety. The description Lori Ridgway gave of her role is not in support of officer safety, so approval of her request would be an exception.*

*Artie Pepin made a motion to approve the Tier 2 request, and Weldon Neff seconded the motion, which passed with Judge Mitchell in opposition.*

*Action Items:*

- *Laura Orchard will ask the Service Desk to process the application as submitted; and,*
- *Will track the exception.*

- b. Grant Finch – T1 Press applicant (see Tabitha Clay and Mr. Cowperthwaite applications for comparison)

*Laura Orchard explained that three Press applications came in at the same time in which two of them had obvious prior media outlet connections (and SOPA accounts) but were now working for themselves in an online presence. The third, Grant Finch, just started a week ago and has not provided any journalist credentials.*

*Judge Mitchell made a motion to have Laura Orchard research prior OAS responses to Press applicants in similar circumstances and bring that information to the July OAS meeting. Ian Bezpalko seconded the motion, which passed without opposition.*

*Judge Noel requested Laura also communicate with Grant Finch about the July 6 OAS meeting.*

**Action Items:**

- *Laura Orchard will research past OAS responses to Press applicants; and,*
- *Will communicate with Grant Finch about OAS reviewing his request at the July 6 meeting.*

6. Case Type Restrictions in SOPA – Suzanne Winsor

- a. Criminal Record Expungement Case Type (see “CRE Case Type” folder)
- i. Once the original case is sealed, who should have access to it in SOPA?

*After the judge grants the sealing request, the sealed case should be available to the Law Enforcement Agency profile.*

*Should all other Justice Partners be able to see these sealed cases too?*

**Action Item:**

- *Suzanne Winsor will speak to Celina Jones about attending the July 6 OAS meeting to present her recommendations on whether all other Justice Partners should be able to see these sealed cases.*

b. Public Health Emergency Order Case Type

- i. Is sealed on initiation. Aside from AOR, who should be able to see this in SOPA?

*In addition, the Emergency Firearms Protection Order case type was discussed as an item for Celina to address with OAS.*

**Action Item:**

- *Suzanne Winsor will speak to Celina Jones about attending the July 6 OAS meeting to present her recommendations on whether all other Justice Partners should be able to see PHEO and ERFPO cases.*

7. Re:SearchNM (see “re:SearchNM” folder)

- a. Case Type Exclusion/Inclusion Spreadsheet
  - i. Seven District case types correctly identified for Tier 2.2?
  - ii. Eleven Domestic Violence case types correctly identified by tier for Case Lookup and SOPA?

*Laura Orchard displayed a spreadsheet of the eleven domestic violence case types that showed how inconsistent the indicators were for whether those case types should be viewable on Case Lookup, the Court Kiosk, Tier 1, and Tier 2.2. It is unknown whether the indicators were conscious decisions or typos or whether they correlate to the live applications. It would appear they should all be the same (Y,Y,N,Y)*

**Action Item:**

- *Laura Orchard will check the live software applications to confirm how it is actually working and bring that to the July 6 meeting if they do not correspond to Y,Y,N,Y); and,*
- *Correct the inclusion/exclusion spreadsheet to match the live applications.*

- b. Re:SearchNM Security Restriction Questions
  - i. Higher tier access to sealed cases within approved case type for that tier?

*Laura Orchard explained that right now a higher tier profile is allowed to see a case type the lower tier cannot, unless it is sealed. The question for re:SearchNM configuration is whether the higher tier profile should be able to see sealed cases within that case type group?*

*It was determined that OAS is not authorized to make that policy determination and a recommendation should go to the Supreme Court.*

*Judge Mitchell made the motion that OAS should make a policy recommendation to the Supreme Court that only the Attorney of Record and the Self-Represented Litigant profiles be allowed to see sealed cases. Artie Pepin seconded the motion, which passed without opposition.*

**Action Item:**

- *Laura Orchard and Suzanne Winsor to provide a draft recommendation to Judges Noel and Mitchell to bring to the July 6 OAS meeting so it can be submitted to the Supreme Court for their August 12 conference.*

- ii. Document security for event code “8668 Sealed Document” – need a standard use for this event code

*Suzanne Winsor explained that, rather than using the proper event code for the document being sealed, some courts are using the 8668 Sealed Document event code, which makes it unclear what the sealed document actually is (for reporting purposes).*

*Although 8668 is supposed to be used when the judge determines no one should be allowed to know what kind of filing it is (EXAMPLE), some courts are using it for things like*

*Motion for Competency Evaluation, which should be seen as an event even though the document itself is sealed.*

*Artie Pepin and Judge Mitchell agreed that the event should always be seen when the document is sealed.*

*Suzanne requested a policy to support an SOP and asked for direction on how to get started.*

*Judges Noel and Mitchell recommended gathering some examples and related SOPs to take to OJUG.*

*Action Item:*

- *Suzanne Winsor to take the policy question to OJUG and then bring back to OAS at the July 6 for the re:SearchNM application question.*

- c. Presentation for Approval of re:SearchNM Migration of Remaining Tiers from SOPA – Laura Orchard

*Laura Orchard provided slides outlining the proposed roll out of the remaining tiers from SOPA to re:SearchNM.*

*Judge Noel recommended adding a note about press releases and converting the information from the slides into the same format as the e-Filing implementation plans to include a statement about possible dates (October/November, if possible, or April 2021 if not) so it can be brought back to OAS at the July 6 meeting for recommendation to JIFFY at the July 16 meeting to be submitted by July 29 for recommendation to the Supreme Court at their August 12 conference.*

*Action Item:*

- *Laura Orchard will add press release information and convert the slides into the plan format for inclusion in the July 6 OAS agenda.*

8. Meeting Adjourned

Next Meeting

Monday, July 6, 2020 at 1:30pm