

**Judicial Technology Council
Online Access Subcommittee
Final Meeting Minutes**

James Noel, Chair

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

Monday, June 7 2021 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; Judge Mitchell, Judge Dominguez, Judge Vega, Barry Massey, Ian Bezpalko, Artie Pepin, Dick Wilkinson, Weldon Neff, Celina Jones, Cindy Martinez, Grace Spulak, Peter Hepburn, Suzanne Winsor, and Laura Orchard

2. Approval of Agenda

A motion was made by Judge Mitchell to approve the agenda, was seconded by Ian Bezpalko, and passed with no opposition.

3. Approval of May 3, 2021 draft minutes

A motion was made by Ian Bezpalko to approve the agenda, was seconded by Judge Mitchell, and passed with no opposition.

4. Follow up on action items from prior meetings (see attached)

Laura Orchard provided a summary of the completed action items from prior meetings.

The committee discussed item 14 regarding the data export behavior in re:SearchNM. Judge Noel asked for this to be added to the July agenda.

Action Items:

- *Laura to meet with Dick Wilkinson to more clearly outline the functionality of the export feature; and,*
- *Dick Wilkinson to discuss the feature with Justice Thomson in order to present a decision at the July OAS meeting.*

5. SOPA Requests

- a. DFA SOPA Access for Landlord Tenant cases – Celina Jones and Grace Spulak

Celina Jones introduced Cindy Martinez and Grace Spulak for a request from DFA for two Tier 1 SOPA accounts in order to access Landlord Tenant cases directly so they can provide the correct guidance for parties to access \$170 million in rental assistance.

Judge Dominguez offered assistance from Metro Court with the internal process with DFA.

By submitting an Attorney Staff application that is signed off by a DFA attorney, Andrew Baronofski, the JID Service Desk can process the accounts.

A motion to approve two Tier 1 SOPA accounts for DFA was made by Artie Pepin, which was seconded by Judge Dominguez, and passed with no opposition.

- b. Press Accounts in Question - Barry Massey

Barry Massey explained that he had performed an audit of the current Press account in SOPA and found roughly 40 that needed to be deactivated due to the journalist no longer being affiliated with the media outlet they originally worked for. This activity has been completed. During the audit, he uncovered a couple of questionable accounts (for attorneys) that may have been a data entry error, or not. These will be investigated by JID.

The committee discussed options for the maintenance of Press accounts, but didn't want to burden the OBS staff with the additional work to reprocess applications. An option was suggested that the form be modified so that going forward, the Service Desk staff could more easily filter out those applicants who are not really journalists.

A motion was made by Judge Mitchell to modify the Press application by adding bullets to explicitly request "a letter from a supervisor or editor confirming journalistic affiliation" and an additional checkbox for "examples of published articles". Artie Pepin seconded the motion, which passed with no opposition.

Action Items:

- *Laura to modify the Press application form for SOPA and re:SearchNM;*
- *Judge Noel to provide the form to the Supreme Court for approval at the next meeting; and,*
- *Judge Noel to verify whether the Supreme Court wants to see these modifications going forward.*

c. Connie Johnston – Press Request

Laura explained that Connie Johnston, who had previously been denied a SOPA Press account, had recently reapplied from a new location with new supporting documentation. Without knowing the history, the Service Desk approved the application.

The committee discussed possible solutions, including making Press SOPA accounts limited in nature, and possibly apply this new limitation at the transition from SOPA to re:SearchNM.

Action Items:

- *As part of the SOPA to re:SearchNM migration, any accounts that have not been accessed in 120 days will be pulled from the migration list; and,*
- *A new policy for all profiles will be drafted by Dick Wilkinson, Suzanne Winsor and Laura Orchard to be presented at the July 12 meeting.*

6. Court Filer CAID 12345 in light of Critical File & Serve Upgrade

Laura Orchard updated the committee on the deletion of the 12345 CAID number in Odyssey, the deletion of that account in all non-attorney F&S accounts, and the creation of a new attorney number to be used for the Court Filer by court staff.

7. SOPA Criteria Spreadsheet Updates – for approval

- a. Policy 2 – Executing this policy to prohibit contract attorneys is not straightforward. If a Tier 1 application from an attorney arrives and does not indicate they are contracting, they rightfully get Tier 1. Does OAS have concerns about this?

A clarification was made that this is about contract attorney staff, not contract attorneys. A recommendation was made to modify the Attorney Staff application form to include the question, “Full Time Staff, Part Time Staff, or Contract Staff” so they would be forced to answer the question.

Action Item: Laura to make the change on the staff application form during the transition to re:SearchNM.

- b. Deleted policies from prior OAS approval.
- c. Added Policy 12 for NMFAP Social Workers to gain AOR access (page 1 and 2)
- d. Updated Blanket criteria 9 for UNM Law Clinic Students getting UNMLS CAID numbers (see pages 1 and 2)

Judge Noel recommended a clarification on the law clinic students to denote they are temporary CAID numbers.

A motion was made by Judge Mitchell to approve the edits to the criteria spreadsheet, which was seconded by Judge Vega, and passed with no opposition.

Action Item: Laura to modify Blanket Criteria 9 to say “...a temporary Law Student CAID number...”

8. Non-Attorney Submissions - Judge Dominguez how Metro receives third party submissions to the court through a Metro-built web application

Judge Domiguez explained that the Metro application is used for community service and is funneled to the Compliance and Clearance Division. It is for information about probation or unsupervised probation. Judge Mitchell agreed that this is good information to know, but there is no driving need to have this go statewide at this time.

9. re:SearchNM Project - informational
 - a. Project and Schedule Update

Laura provided a status report for the re:SearchNM project and responded to questions regarding issue resolution and a timeframe moving forward. Suzanne Winsor underscored the importance of making sure we do not apply arbitrary dates to this project roll out and said she will wait until all of the bugs have been resolved before discussing a migration date. The next JTECH update on this project will be at the November meeting.

Judge Mitchell reiterated that the File & Serve Upgrade project is a higher priority at this time.

- b. Document Security Group Configuration – see written statement

Laura displayed the document security group document and explained that the first question regarding sealed document security groups has been answered, but that the warrant document security groups still need to be addressed.

Judge Mitchell indicated that the PII contained in warrant documents is not a legitimate reason to seal these, but the real reason for sealing them from the public is for safety. The timeframe for unsealing is after the warrant is executed. Bench warrants are not a concern.

Arrest warrants benefit the Attorney of Record, but they are kept out of Case Lookup.

Artie Pepin suggested that if we can have confidence that the courts are sealing pre-execution and unsealing upon execution, then no action needs to be taken.

Suzanne said an SOP and some training can be provided by OBS.

Action Item: Per Judge Noel, Laura to add this item to the July OAS meeting.

- c. Sealed Case Policy Conflict for Tier 2.1 and Tier 2.5 – request withdrawn

10. Meeting Adjourned

Next Meeting - Monday, July 12, 2021 at 1:30pm