

**Judicial Information Systems 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, October 5, 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, Judge Mitchell, Joey Moya, Weldon Neff, Barry Massey, Dick Wilkinson, Artie Pepin, Judge Dominguez, Suzanne Winsor, Laura Orchard, Celina Jones, and Margarita Terrell*

*Guests: Chris Woodward, DOH; Peter St. Cyr, Open Access New Mexico; Tom Johnson; Judge Sedillo; and, Tiffany Archuletta*

2. Approval of Agenda

*Judge Mitchell made a motion to approve the agenda, and Ian Bezpalko seconded. The motion passed without opposition.*

3. Approval of August 31, 2020 draft minutes

*Judge Mitchell made a motion to approve the August 31 meeting minutes with one typographical change on page 2, and Ian Bezpalko seconded. The motion passed without objection.*

**Action Item: Laura Orchard to correct the typo and post to the website.**

4. Follow up on action items from August 31 meeting

*Laura Orchard provided a brief update on the action items from August 31, all of which were completed except for one. The remaining action item is for Laura Orchard and Phillip Vaden of Tyler to draft a scoping document for the Case Lookup replacement development.*

5. E-Filing Project Updates – Margarita Terrell, Tobie Fouratt

- a. Metro Court Civil e-Filing (see “Lessons Learned” in e-Filing folder)
- b. Magistrate Court Civil e-Filing

*Margarita Terrell and Suzanne Winsor presented the lessons learned document developed after the Metropolitan Court e-Filing roll out. Some notes from the discussion are:*

- *Judge Sedillo asked if the aim of the Supreme Court is to go paperless, because the “hybrid” file folder becomes useless to someone requesting a complete file;*
- *Artie Pepin confirmed that going paperless is a Supreme Court goal;*
- *Judge Noel asked if any of the lessons learned will make a revision of the Magistrate Implementation Plan necessary;*
- *Suzanne Winsor identified the proposed text rule change possibly being an element to add to the Magistrate Implementation Plan;*
- *Suzanne Winsor also suggested that both Metro and Magistrate be on criminal e-filing prior to rolling out the SRLs on e-filing, which means two additional implementation plans need to be drafted;*
- *Judge Sedillo noted that the District court’s process for proposed text doesn’t really apply to Metro’s faster timeframes;*
- *Judge Noel recommended OBS staff draft an updated Magistrate Implementation Plan to incorporate any of the lessons learned that apply, for November OAS approval;*
- *Suzanne Winsor explained how the lessons learned are already being incorporated into the Magistrate project by providing CEOC presentations and a steering committee of 28 judges and staff;*
- *Margarita Terrell said that the steering committee is meeting weekly with a three-item agenda including:*
  - *Configuration*
  - *Business processes*
  - *Judge signature processes*

**Action Item:** *OBS staff to update the Magistrate e-Filing Implementation Plan as it relates to lessons learned from the Metro roll out, for informational submission to the Supreme Court*

## 6. Policy Discussions

- a. Public Health Emergency Order Sealing Rule Amendment – Celina Jones and Chris Woodward, DOH

- The operative change (approved by judges District 2) adds public health-related isolation or quarantine cases to the court sealing rule, Rule 1-079:

*(11) proceedings concerning isolation or quarantine commenced under the Public Health Act, Chapter 24, Article 1, NMSA 1978 or the Public Health Emergency Response Act, Chapter 12, Article 10A NMSA 1978.*

*Celina Jones made the recommendation that the request to the Supreme Court be framed as an amendment to rule 1-079 as written above in order to make Public Health Emergency Order case types sealed upon initiation in an automated way, because each of these cases will include protected health information about the individual.*

*Joey Moya indicated the normal process for a rule change would be for OAS to make the recommendation to the civil rules committee, but due to the subject matter and the timeframe, OAS can ask for out-of-cycle treatment by the Supreme Court. He also mentioned his concern*

*about the sealing being easy on the clerks based on the case types for isolation and quarantine of an individual, and not about an inspection of an establishment.*

*Suzanne Winsor noted that the civil Public Health Emergency Order (PHEO) case type (PH identifier), used for isolation and quarantine, is already configured to be sealed automatically upon initiation.*

*Judge Dominguez made a motion to ask for an out-of-cycle rule change by the Supreme Court for the rule amendment for petitions for isolation or quarantine. Judge Mitchell seconded the motion. Judge Noel recommended it be clarified that the automatic sealing is only for petitions for isolation or quarantine. Judge Dominguez amended her motion to include "...for isolation or quarantine of individuals". Judge Mitchell seconded the amendment. The motion passed without opposition.*

**Action Item:** *Judge Noel to submit an out-of-cycle recommendation to the Supreme Court for an amendment to 1-079, or submit by Wednesday, October 7 for inclusion in the October 14 Supreme Court Conference.*

7. Re:SearchNM (see "re:SearchNM" folder)

a. Access to Set of Personally Identifying Information – which Tiers should see it?

*Laura Orchard displayed the set of personally identifying information (PII) that will display as a static set depending on the tiers the committee determines. The committee had a discussion and decided the following tiers will see the PII data set via re:SearchNM:*

*Public profile – no  
All other tiers/profiles - yes*

*Judge Mitchell asked if the Public profile can have different display of the same data set (i.e. DOB shows year only, or SSN shows last four only) even though searching on the whole DOB or SSN can be performed.*

**Action Items:**

- *Laura Orchard will verify with Phillip Vaden that a Tier 1 for Public can be configured differently than a Tier 1 for anyone else, and whether the display of the PII can be different for one profile over another; and,*
- *Laura will convey the above OAS decision to Phillip Vaden.*

b. SOPA to re:SearchNM functionality matrix

*Laura Orchard displayed the matrix comparing the functionality and features between SOPA and re:SearchNM. OAS made a request for this matrix at the August 31 meeting in preparation for training and transitioning when SOPA accounts get migrated to re:SearchNM. This will be a tool for answering questions of users who have used SOPA in very specific ways and want to know how to do that in re:SearchNM.*

c. re:SearchNM Project Update Slides

*Phillip Vaden, of Tyler prepared a deck of slides for a monthly executive level call for the re:SearchNM project. Laura Orchard specifically shared the timeline slide to explain the expectations that have been set for the development, testing, migration, and training.*

*Development is to be complete by 12/31/2020, testing from 1/7/2021 through 4/9/2021, 4/19/2021 is the migration date and the date to stop providing new SOPA accounts, training over a period of one month will begin, and then deactivating SOPA 6/7/2021.*

*Judge Noel recommended providing this information to the Supreme Court. Concerns were raised about how to mitigate any backlash from users from having to switch platforms with a hard deadline of 6/7/2021. Incorporated into the project schedule are multiple communications to the users informing them of the timeline as well as a full month of training for all types of users prior to the deprecation of SOPA. Additionally, the migration from SOPA to re:SearchNM will be after the end of the legislative session.*

**Action Items:**

- *Judge Noel will provide the timeline slide to the Supreme Court for informational purposes for their October conference, with the caveat that JIFFY will not approve the timeline until the November 19 meeting;*
- *Laura Orchard include the slide deck in the November JIFFY meeting; and,*
- *Dick Wilkinson will following up on the Project Definition Document to have be signed by Artie Pepin.*

8. SOPA Requests (see “SOPA Request” folder)
  - a. Connie Lee Johnston – Press Tier 1 Request – no website or media relationship

*The committee discussed the request and determined that Connie Lee Johnston does not meet the definition of journalist, and has no background or prior history of publishing or authoring articles in any publication.*

- b. Austin Fisher – Press Tier 1 Request – no website or media relationship

*The committee discussed the request and determined that Austin Fisher worked for many years in a number of news organizations, has a history as a journalist and, although he is freelance now, he continues to practice journalism.*

*Barry Massey made a motion to deny Connie Lee Johnston and approve Austin Fisher. Weldon Neff seconded the motion. The motion passed without opposition.*

**Action Item:** *Laura Orchard will follow up with the two requesters through their service desk incidents.*

9. Select day to review criteria and profiles. The response from the Supreme Court will be presented at the November 2 OAS meeting. Full day December 7 meeting?
  - a. Invite Joey Moya, Celina Jones, Rachele Klump

*The committee discussed what will be involved in the review process. It was determined that the December 7 meeting will focus only on this item.*

**Action Item:** *Laura Orchard will send out the Exclusion/Inclusion Spreadsheet and the Criteria Spreadsheet to the members of the committee to review ahead of time.*

10. Meeting Adjourned

Next Meeting: Monday, November 2, 2020 at 1:30pm