re:Search®NM User Guide for New Mexico

Release 2019.2

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Tyler Technologies Technical Support Contact Information

For assistance, contact Tyler Technologies through the following resources.

Resource	Contact Information
Support Hours	7:00 AM to 9:00 PM (CT), Monday through Friday
Telephone	Attorneys, Self-Represented Litigants, and Other Registered Users: 844.307.8720
Email	Research.Support@tylertech.com

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1 About re:Search®NM

re:Search®NM ® is a secure web portal that allows attorneys, self-represented litigants (SRLs), justice partners, and other registered users access to court records and documents across the state.

As a registered user, you have the choice of using the Basic free version that has all of the functionality New Mexico users have become accustomed to, including new more advanced search options, or you can opt to purchase a Premium or Pro subscription to access additional features.

Because re:Search®NM is a browser-based application, you can access it from any personal computer or smart mobile device.

Topics covered in this chapter

Features and Functionality

This section describes the re:Search®NM features and functionality as of 12/12/2022.

Functionality
Tiered Registration (21 profiles)
Auto-Registration for Tier 1 and Attorney of Record Access
Case Record Search
By Attorney Name
By Case Category
By Case Number
By Case Status
By Case Type
By Filing Date
By Judge Name
By Location
By Location - Filterable by District or Mag
By Party Name
Sort all search results by
Case Category
Case Number
Case type
Filing Date
Reverse Date Order

Functionality
Sort all search results by (cont)
Status
Table View of Results
Unique Location or Group
Party Search
By Case Status
By DOB
By Driver's License
By Filing Date
By First OR Last Name
By First/Last Name
Attorney Search
By Name and/or CAID Number
By Open or Closed Status
By Filing Date
DOB Search
Driver's License Search
Business Name Search

Figure 1.1 – Features and Functionality List

Functionality
Case Information Displayed in Results
Case number
Case Style
Case type
Charges
Filing date
Judicial Officer
Location
Warrant Flag
Case Information Displayed in Details
Attorney CAID Number
Attorney Name
Case Number
Case Style
Charge date
Charge Sequence
Charges
Dispositions
DL number
DOB
Documents Linked to Events
Events
Events and Hearings in Table View
Events and Hearings Interleaved by Date
Events and Hearings Sortable by Date
Events Without Documents
Filing Date
Gender
Hearings
Height/Weight
Judicial Officer
Level
Location
Party Aliases
Party Name
Party Type
PDF Files
Person ID
Race
Register of Actions View
Related Cases
Related Cases Hyperlinked

Functionality
Case Information Displayed in Details (cont)
Reverse Date Order on Register of Actions
Searchable PDFs
State ID
Statute
TIF Files
Warrant Flag
Financial information
Amount of Transaction
Balance Due as of XXX
Date of Transaction
Payment Made on Behalf Of
Receipt Number
Total Financial Assessment
Total Payments and Credits
Transaction Type
Filings Search (docketed event code)
By Case Category
By Case Filing Date
By Case Type
By Filing Code
By Filing Code Date
By Location
Hearings Search (Court Calendar in SOPA
By Attorney Name
By CAID Number
By Case Category
By Case Description
By Case Filed Date
By Case Number
By Case Status
By Case Type
By Hearing Date
By Hearing Type
By Judge Name
By Location
By Party Name
Sort results by
Case Number
Date/Time
Defendant Name
Hearing Type
Judicial Officer
Plaintiff Name

Functionality
Other New Features
Wildcard and Boolean Search Terms
Search by Any Word
Data Mining Controls
File into Case (for attorneys)
My Cases (for attorneys and pro se)
Subscription Features
Recently Viewed Cases
Saved Searches
Case Alerts
Name Alerts
Search Alerts
My Folders
My Hearings (for attorneys and pro se)
Filing Feed

Frequently Asked Questions

The *Frequently Asked Questions* page of the site answers questions about re:Search®NM.

To display the *Frequently Asked Questions* page, click **FAQs** button at the top of the re:Search®NM window.

Availability of Court Records and Documents

re:Search®NM allows you to search for and see case information across the state. Updates made to the case record by court staff or by electronic filings from attorneys should display in re:Search®NM within moments of the transaction, within the restrictions set forth by the New Mexico Supreme Court.

re:Search®NM Integration with Court's Case Management System

re:Search®NM provides users with access to case information and documents across the state, because re:Search®NM can communicate directly with the Odyssey case management system (CMS).

- Certain tasks that are performed in the court's CMS are carried over into the re:Search®NM system automatically. These include the following tasks:
  - Creating a new case
  - Accepting a new case through File & Serve
  - Changing the status of a case
  - Sealing or expunging a case
  - Updating filings or documents on a case
  - Accepting new filings into the case through File & Serve
  - Adding or changing parties or participants on a case

  - Payments made that update the financials on the case
  - Adding disposition data
  - Changing the security level on a case, filing, or document
  - Adding, changing, or removing an attorney on a case or marking a party as Pro Se
- In re:Search®NM, when a user requests a document to view, that document is accessed from the court's CMS, thus ensuring that the person is viewing the most recent version of that document.

Tiered Case Access

Based on New Mexico Supreme Court Rules and Statutes, and on criteria set forth by the Judicial Technology Council's Online Access Subcommittee, users such as attorneys, justice partners, law enforcement, members of the press, and other identified users have been provided different levels of access to case information. The tiered access displays or restricts information by case type, case security, document security, and party security.

Case Access for Self-Represented Litigants

A self-represented litigant, also called a Pro Se party, is a party on a case who has chosen to represent themself instead of using an attorney. Because a self-represented litigant is essentially serving as their own attorney, that person has the same privileged access to the case, including all associated filings and documents.

If you are a self-represented litigant and have applied for (and been approved for) access in re:Search®NM, the cases you have been approved for will be available in your account.

If you do not see a case on your *My Cases* page that you think should be there, contact the Judiciary's IT Support Desk.

re:Search®NM Basic, Premium, and Pro

re:Search®NM Basic is the free version for all users. This User Guide provides guidance for Basic users in sections 1 through 8, and 14.

re:Search®NM Premium and re:Search®NM Pro are paid subscription services that give subscribers access to advanced features in re:Search®NM. In addition to providing guidance for Basic users, this User Guide provides guidance for Subscription users in sections 9 through 15.

Use the Pricing page to review pricing and start a free trial of either subscription service.

Open the *Pricing* page by clicking the **Pricing** or **Upgrade** link at the top of the re:Search®NM page or by selecting **Upgrade** from the re:Search®NM menu ☰).

Once you start your free trial, use the *My Account* page to manage your subscription.

If a feature is relevant only to a certain profile, or is a subscription feature, that section will be identified in this User Guide with one of these identifiers:

2 Getting Started

Topics covered in this chapter

- Registering and Activating Your Account
- Submitting Your Application
- Signing In
- Signing Out
- Changing Your Password
- Resetting Your Password
- Session Timeouts
- Keyboard Navigation
- Support Information

This chapter provides instructions for requesting access to re:Search®NM, signing in and out, and resetting and changing your password.

Registering and Activating Your Account

Before a new user can access re:Search®NM, you must register and activate your account. When you sign in the first time after you activate your account, you will be asked for some additional information about yourself to complete the registration process.

Note: Existing File & Serve™ filing attorneys should sign in to re:Search®NM with those same account credentials. Simply click the Sign In button, which will lead you through the remaining registration steps.

All others will need to register first AND submit an application form. The application process for each type of user can be found by clicking the **How to Get Access** button.

1. Open your browser, and go to https://researchnm.tylerhost.net/
2. Click **Register** at the top of the page. The *Register* dialog box opens.

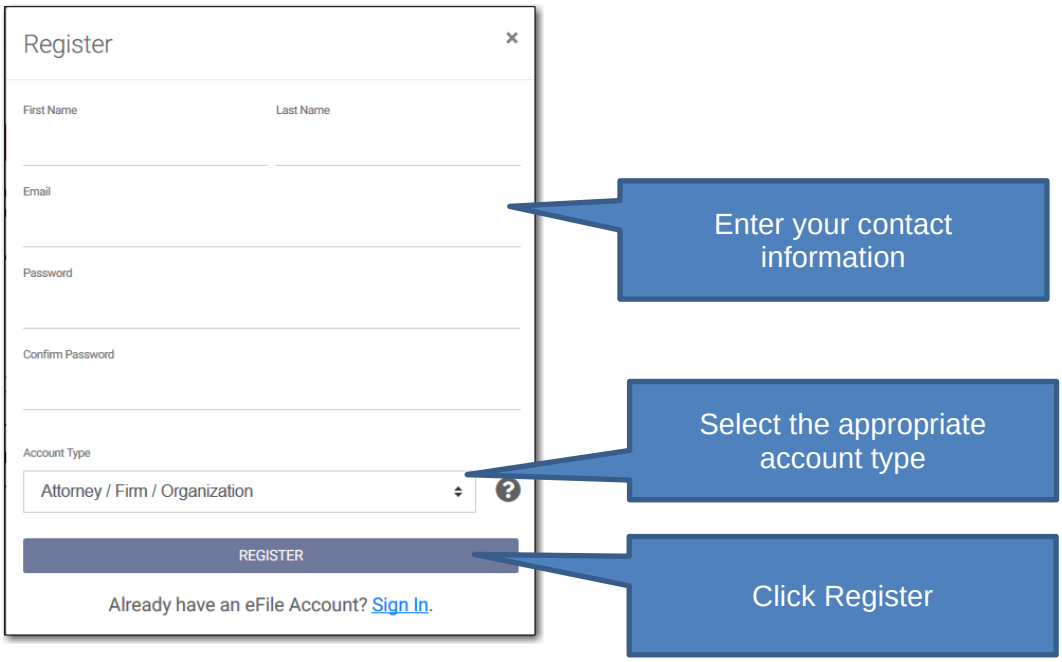


Figure 2.1 – Register Dialog Box

3. Type your name, email address, and password in the fields provided.
4. Select your account type from the **Account Type** drop-down list.

Account Type	Description
Attorney	Select this option if you are one of the following: • An attorney in private practice • An attorney of a law firm or organization **Note: As an attorney, you must be licensed and in good standing, and in possession of a Supreme Court CAID number. The contact information entered must match the contact information in Odyssey.**
Self-Represented Litigant / Pro Se	Select this option if you are a self-represented litigant on a case. **Note: A self-represented litigant (also called a Pro Se party) is a party on a case who has chosen to represent himself or herself instead of using an attorney.**
All Others	Select this option if you are Staff for an Attorney, a Justice Partner, an FBI Justice Partner, or a member of the Press.

5. Click **Register**.
   re:Search®NM creates your account and sends you a confirmation email.

6. Open your confirmation email, and click the **Activate Account** link.
   After you click the **Activate Account** link, re:Search®NM opens a new browser tab and displays an *Account Activated* dialog box.

Account Activation Required

When you request access to re:Search®NM, you are required to verify your email address by clicking a link that was emailed to that address. Clicking this link activates your account.

If you attempt to sign in to re:Search®NM before you have activated your account, re:Search®NM redirects you to your location's File & Serve application, which displays the message shown in the following figure.

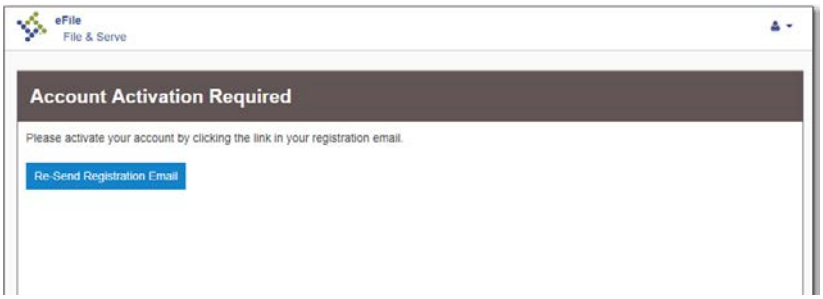


Figure 2.2 – Activate Your Account Message

As noted in the message, you must click the link in the registration email to activate your account. If you cannot locate the email, click **Resend Activation Email** to have a new email sent to you.

7. Click **Sign In**.
   The *Sign In* page opens.

8. Type your email address and password in the fields provided, and then click **Sign In**.
   The *Contact Information* page opens, and then a *Terms and Conditions* dialog box immediately opens on top of it.

9. Click **Continue** on the *Terms and Conditions* dialog box to agree to the terms and conditions and close it. The *Contact Information* page is displayed.

10. Complete the fields on the *Contact Information* page.
11. Do one of the following, depending on which button is displayed at the bottom of the *Contact Information* page:

    - Click **Next** to continue with the registration process. re:Search®NM displays a list of roles and asks you to select the role that best describes you. Continue with the next step.
    - Select the check box for the role that best describes you. You can select more than one role.
    - If you select the Attorney role, re:Search®NM displays additional practice areas. Select one or more of these practice areas.
    - Click Continue

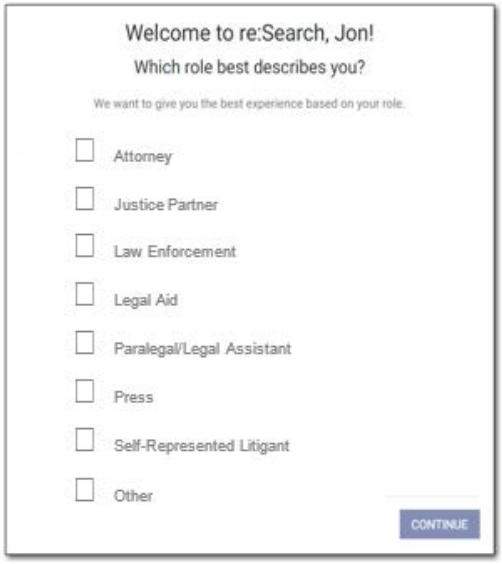


Figure 2.3 – Role Selection Dialog Box

Depending on the role you selected, the following results occur:

- If you selected any role other than the **Attorney** role, you have completed the self-registration process and can skip to the **Submitting an Application Form** section on page 15

Attorney Verification

Attorneys in good standing with the New Mexico Supreme Court are afforded attorney of record access and access to their cases in re:Search®NM. When you sign in to re:Search®NM as an attorney, re:Search®NM first verifies your Supreme Court CAID number and status by cross-referencing your email address and bar number with a list of active attorneys in the Odyssey database. If re:Search®NM confirms that you are still an active attorney, you are allowed to proceed with full attorney privileges.

If you selected the **Attorney** role, re:Search®NM will provide a tool for you to enter your Supreme Court CAID number to link your account to the cases on which you are the attorney of record.

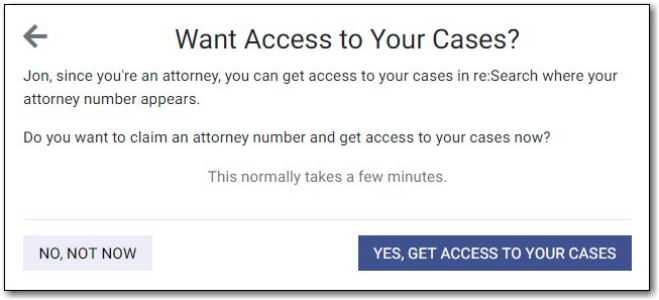


Figure 2.4 – Want Access to Your Cases? Dialog Box

12. Do one of the following:

    - If you do not want to link your attorney number (you can always do this later), click **No, Not Now**. re:Search®NM then displays the *Dashboard*, and you can begin using re:Search®NM for Tier 1 cases. You have completed the self-registration process. re:Search®NM will display a welcome message with an introduction to re:Search®NM and a brief description of what you can do in re:Search®NM.
    - If you want attorney of record access to your cases now, (this is recommended), click **Yes, Get Access to Your Cases**.

13. Enter your New Mexico Supreme Court CAID number in the Search by Name or Attorney Number field, (just the 5 digits with no slash, including any leading zeros), and then click **Search.**

    re:Search®NM looks for your name based on your CAID number in the list of active attorneys provided by the New Mexico Supreme Court. If you search by name, (not recommended) it may display the name and attorney number for each possible match. If there are a lot of matches, use the **Next** and **Prev** buttons to locate your name in the search results.

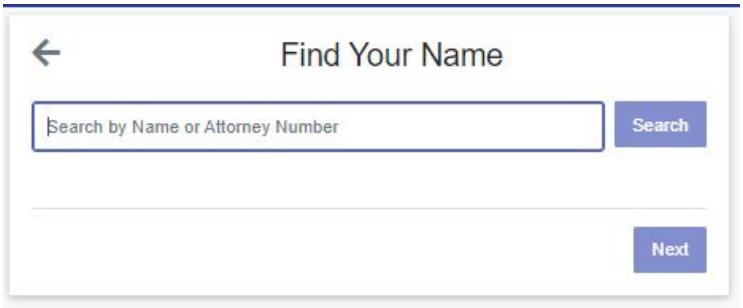


Figure 2.5 – Entering CAID Number on the Find Your Name Dialog Box

14. Click your name to select it, and then click **Next**.

    The *Confirm You Are This Attorney* page opens. This page prompts you to send a confirmation email to ***the email address on record*** to confirm that you are the selected attorney. Examine the displayed encrypted email address carefully to determine whether it is current.

    Note: If the displayed encrypted email address does not match your current email address, you will need to reach out to the New Mexico Supreme Court to have your Attorney Record updated. Until your attorney record is updated, you will have access only to Tier 1 cases, not your attorney of record cases.

15. If the email address displayed is current, click **Send Confirmation Email**.

    re:Search®NM displays a confirmation message, which states that a confirmation email has been sent to the ***email address that you have on file with your state.***

16. When you receive the confirmation email, open it and click the link provided.

Your attorney account with re:Search®NM is now confirmed, and the re:Search®NM *Dashboard* is displayed. You are already signed in and can begin using re:Search®NM. Depending on your state and user role, re:Search®NM may display a welcome message with an introduction to re:Search®NM and a brief description of what you can do in re:Search®NM.

If re:Search®NM finds that you are no longer an active attorney, it displays the following message.

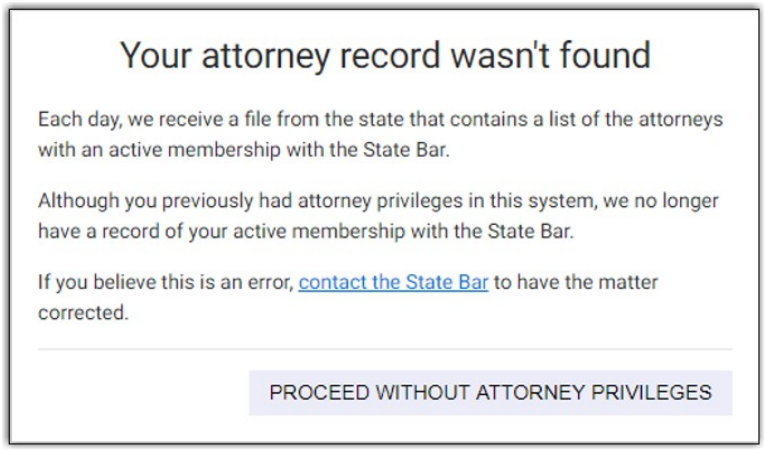


Figure 2.6 – Your Attorney Record Wasn't Found Message

If you believe that this is a mistake, contact the Judiciary Service Desk to confirm your status in the Odyssey case management system. My may be required to contact the New Mexico Supreme Court to update your contact information.

Submitting An Application Form

NOTE: Attorneys do not need to submit an application form unless applying for Tier 2 access to court delinquency cases children's

All non-attorneys must submit an application form to gain access to re:Search®NM

17. For instruction, click the **How to Get Access** at the top of the page.

18. Select the **down arrow** next to the option that best suits your role:

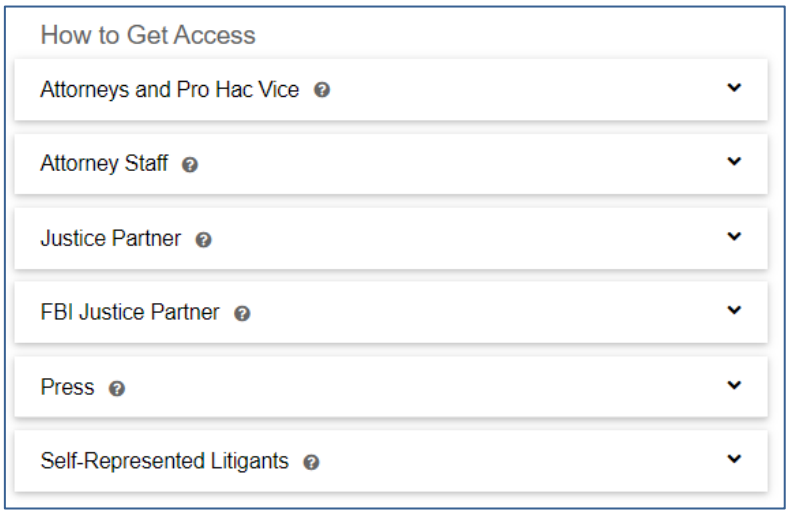


Figure 2.7 – How to Get Access Screen

19. Click or hover to get the information you need and follow the instructions for your role.

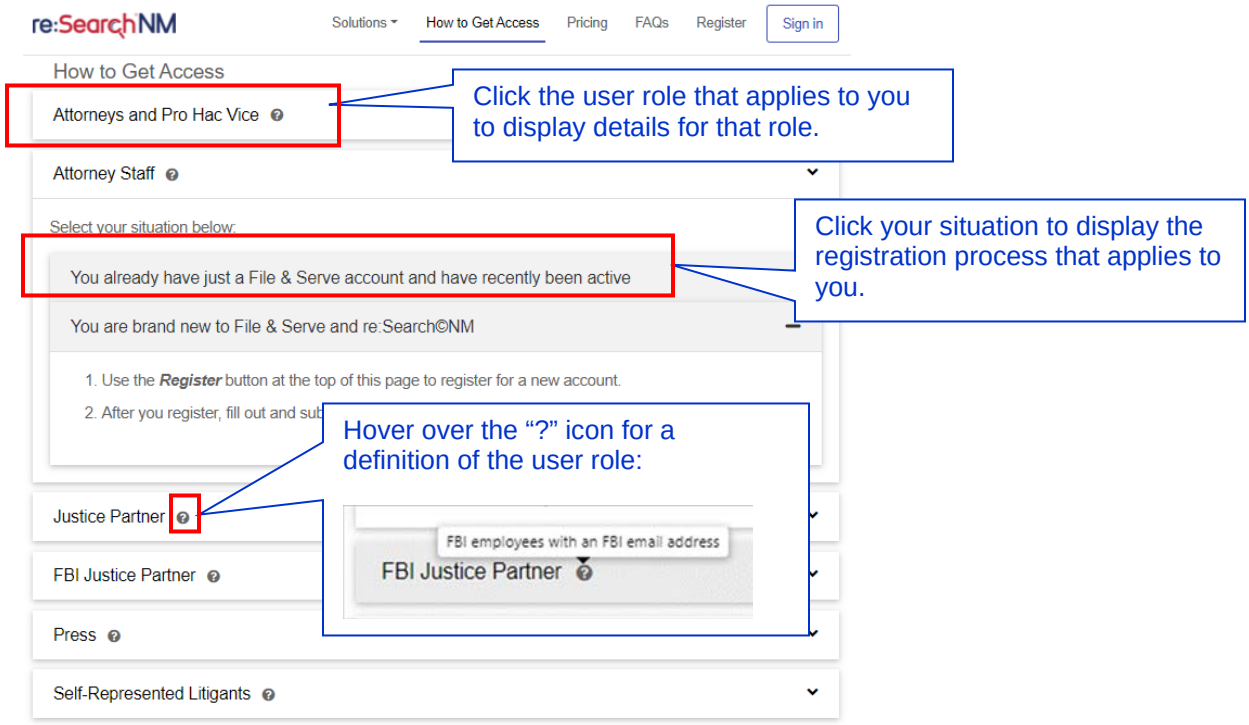


Figure 2.8 – How to Get Access Screen Detail

Signing In – All Users

1. Open your browser, to access the re:Search®NM website at https://researchnm.tylerhost.net. Do not user Safari.

   The re:Search®NM home page opens.

2. Click **Sign In**.

   The *Sign In* page opens.

3. Type your email address in the **Email** field as your user ID and password.

   Note: If you forget your password, click *Forgot Password?* to reset your password.

4. Click **Sign In**.

Results:

- If you have signed in before and your account is in good standing, by default, the first page that is displayed is the *Dashboard*.
- If this is your first time to sign in, re:Search®NM needs to confirm your identity and activate your account. Refer to "Registering and Activating Your Account" for more information.

Signing Out

When you are not actively using re:Search®NM, it is recommended that you properly sign out to prevent unauthorized use of your account.

To sign out:

1. On the omnibar at the top of the *re:Search®NM* window, click the Profile menu (MC).
2. Click **Sign Out**.

Changing Your Password

You can change your password at any time.

To change your password:

1. On the omnibar at the top of the *re:Search®NM* window, click the Profile menu (MC).
2. Click **Change Password**.

   The *Change Your Password* dialog box opens.

   Note: If you are signed in to re:Search®NM with your Odyssey® File & Serve™ account, you are prompted to access that application to change your password.
3. Type your new password in the **Password** field.
4. Retype your new password in the **Confirm Password** field.
5. Click **Change Password**.

   A confirmation screen displays the following message:

   `Your password has been changed successfully.`

Resetting Your Password

If you have forgotten your password, you can reset your password by clicking the **Forgot Password?** link on the sign-in page.

To reset your password:

1. Open your browser, and go to the re:Search®NM website.
2. Click **Sign In**.
3. Click **Forgot Password?**.
4. Type the email address you provided during the registration process in the Email Address field, and then click **Next**.

   Note: If the system is unable to find your email address, an error message is displayed stating that no user is registered with that email address.
5. A password reset link has been sent to the email address associated with your account. Open the email, and click the link labeled click here to reset your password.
6. Type a new password in the **New Password** field.
7. Retype your new password in the **Repeat New Password** field.
8. Click **Change Password**.

Session Timeouts

To reduce the chances of unauthorized access to court records when you leave your workstation or mobile device unattended and unlocked for any reason, your re:Search®NM session will automatically expire if no activity is detected after a set number of minutes.

Before your session expires, re:Search®NM will display a message with a timer showing how long before your session expires. You can then choose to either sign out immediately or cancel the countdown and continue using re:Search®NM. If you do nothing, you will be signed out automatically when the countdown finishes.

Keyboard Navigation

If you prefer to work from a PC (desktop or laptop) and do not like using a mouse or trackpad, you can use a few keys on your keyboard to navigate through re:Search®NM as well as some keyboard shortcuts.

Key or Key Combination	Description
TAB	Press TAB to move forward between cards, fields, buttons, menus, and drop-down lists.
SHIFT+TAB	Press SHIFT and TAB together to move backward between cards, fields, buttons, menus, and drop-down lists.
ENTER	Press ENTER to perform the following actions: • Open menus, drop-down lists, and links. • Select options from menus or drop-down lists. • Select buttons.
SPACEBAR	Press SPACEBAR to select options, check boxes, or buttons.

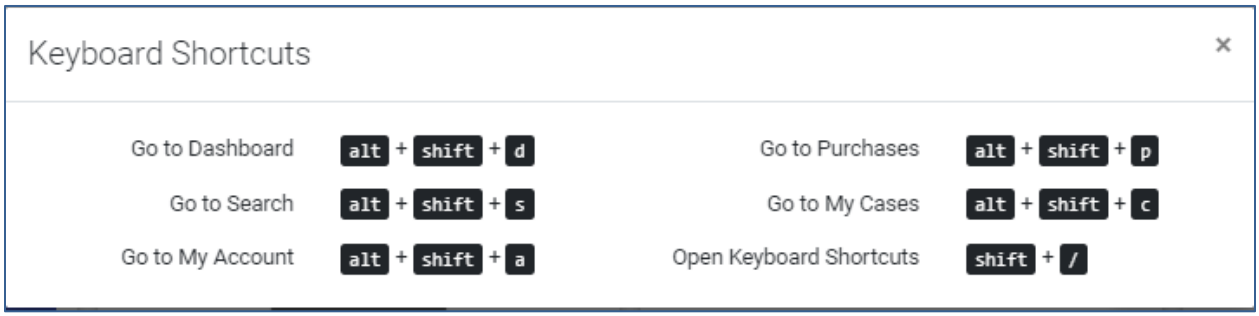


Figure 2.9 – Keyboard Shortcut Window

Support Information

If you need assistance or want to learn more about re:Search®NM, the *Help* section is a good place to start.

If you are signed in, select **Help** from the Omnibar ( ). You will see four Help options to choose from.

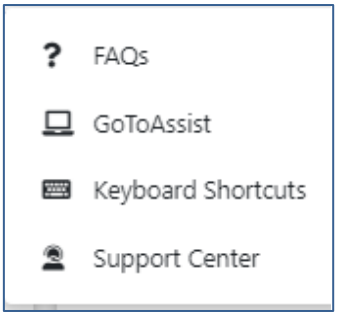


Figure 2.10 – Support Information Dialog Box

The *Support Information* dialog box includes the following information, which varies by state and user role.

Option	Description
FAQs	Click this link to display the *Frequently Asked Questions* page.
GoToAssist	Click this link to use Tyler's GoToAssist tool, which allows a Tyler customer support representative to see and, if necessary, remotely operate your computer. Use this option only if directed to do so by your Tyler customer support representative.
Keyboard Shortcuts	Click this to show the keyboard shortcuts keystrokes.
Support Center	Click this link to access Tyler's Self-Service Support website.
Chat	Click this link from the Support Center Contact Us page to start an online chat with a Tyler customer support representative for immediate assistance from Monday – Friday 8am -7pm CST.
Email	Click this link on the Support Center Contact Us page to start an email addressed to Tyler customer support. from Monday – Friday 8am -7pm CST
Phone	Call 844-307-8720 to speak to a Tyler customer support representative from Monday – Friday 8am -7pm CST.
New Mexico's Judicial Information Division Service Desk	Email support@nmcourts.gov or call 505-629-3291

3 re:Search®NM Home Page

Topics covered in this chapter

- Home Page and Home Page Links
- How to Get Access Page
- Pricing Page
- Basic Features and Subscription Features

The re:Search®NM home page is the webpage you see when you first open the re:Search®NM website in a browser before you sign in. The home page provides a basic overview of re:Search®NM, including how it works and why you might want to consider using it. From the home page, you can also access additional information about re:Search®NM functionality and features, register as a new user, or sign in to re:Search®NM.

The following figure shows part of the re:Search®NM home page, and scrolling down on that page will reveal additional information about the product.

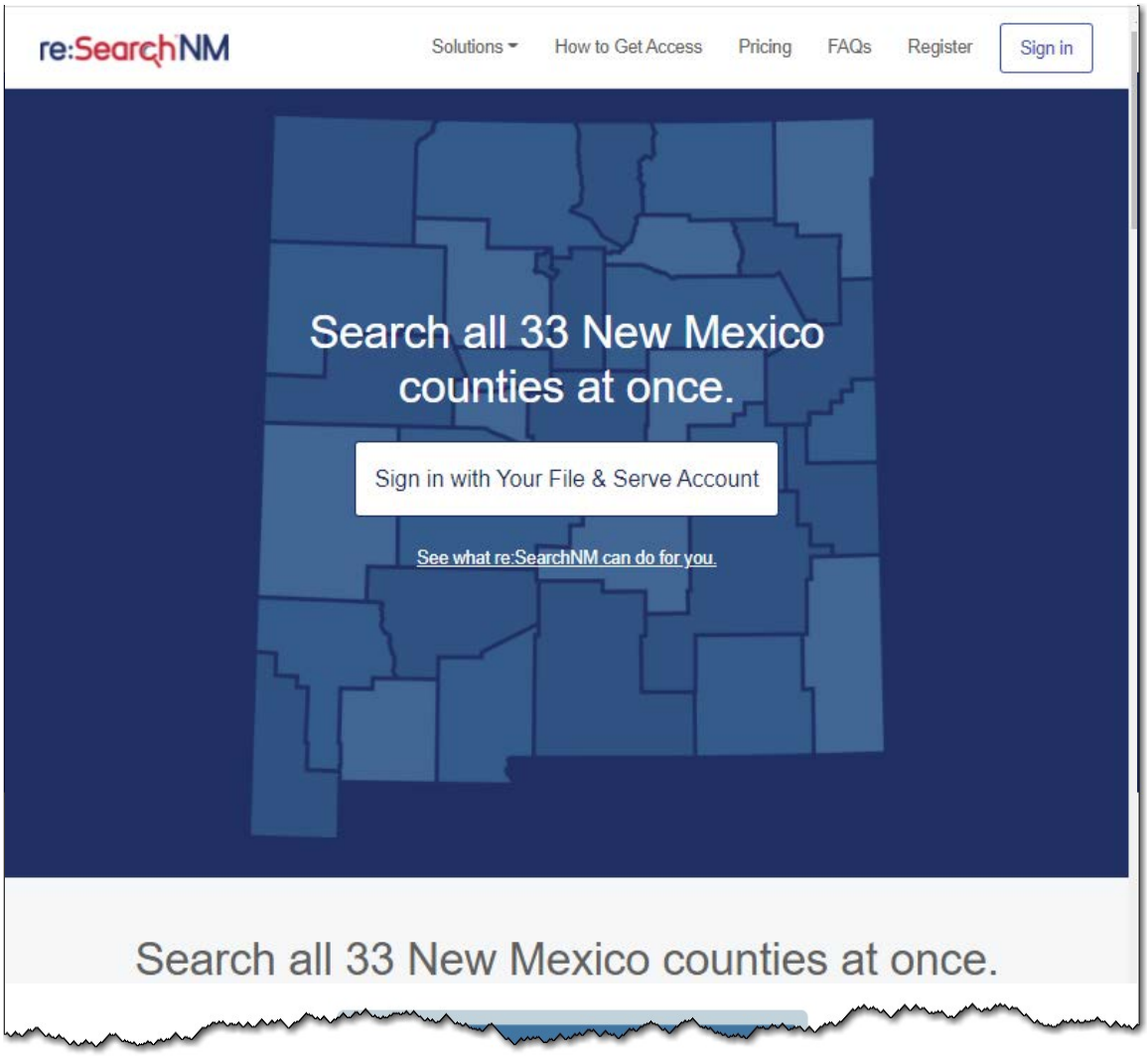


Figure 3.1 – Top Portion of the re:Search®NM Home Page

Home Page Links

You can use the links on the home page to access additional information about re:Search®NM, register as a new user, sign in or sign out. When you view the home page on a small mobile device or resize your browser to make it smaller, the links along the top of the page move to the menu button ☰) to save room.

Before Login:

Link	Description
Solutions	Clicking on any of the items in this link will provide you with more information about this feature of re:Search®NM
How to Get Access	Click this link to display the *How to Get Access* page, which tells you how to register for a new account depending on your role.
Pricing	Click this link to display the *Pricing* page. From this page, you can learn more about the features that come with re:Search®NM Premium and re:Search®NM Pro subscriptions and also start your free trial.
FAQs	Click this link to display the *Frequently Asked Questions* page.
Register	Click this link to begin the registration process. **Note: Judges follow a different registration process. Contact the Judiciary's IT Service Desk.**
Sign In	If you are already a registered user, click this link to sign in to re:Search®NM. This link is displayed only if you are not signed in.

How to Get Access Page

The *How to Get Access* page describes the steps that each type of user of re:Search®NM should follow to register for a new account. This section is described in detail on page 15 and 16.

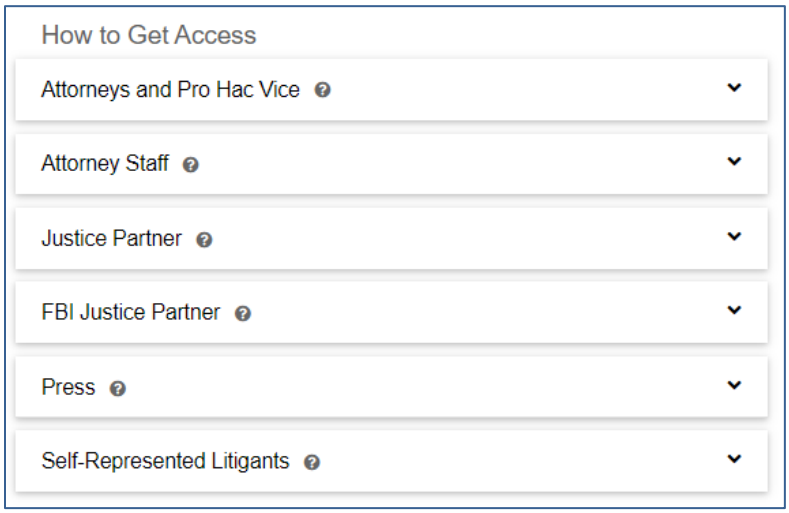


Figure 3.2 – How to Get Access Page

Pricing Page

re:Search®NM Basic is free to all registered users. re:Search®NM Premium and re:Search®NM Pro are paid subscription services that give subscribers access to advanced features in re:Search®NM. Use the *Pricing* page to learn more about the features that come with re:Search®NM Premium and re:Search®NM Pro, review pricing, and start a free trial of either subscription service.

Note: Users concerned about any loss of functionality that was in Secured Odyssey Public Access (SOPA) can be assured that even the Basic version of re:Search®NM provides more functionality and ease-of-use features than SOPA.

Open the *Pricing* page by clicking the **Pricing** or **Upgrade** link at the top of the re:Search®NM page or by selecting **Upgrade** from the re:Search®NM menu ☰).

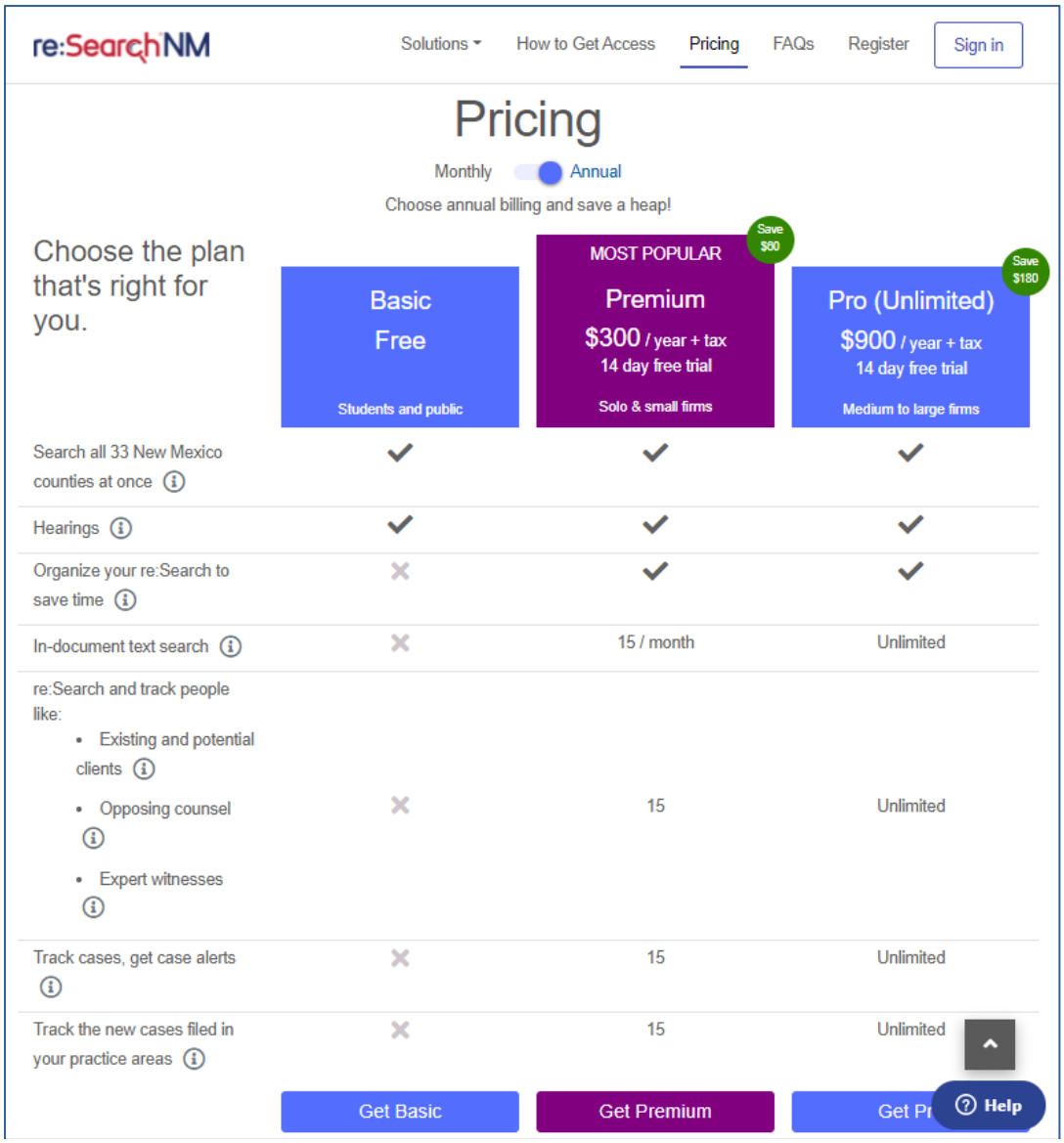


Figure 3.3 – Pricing Page

4 Omnibar and re:Search®NM Menu

The omnibar along the top of the *re:Search®NM* window displays the re:Search®NM logo (which also serves as a link to the *Dashboard*) and various menus and buttons. The available options depend on your subscription status. The re:Search®NM menu is displayed on a separate row below the omnibar.

The following screen shot shows the omnibar as it might appear for a user who is subscribed to re:Search®NM Pro.

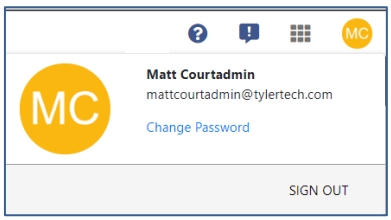
Figure 4.1 – Omnibar Options and re:Search®NM Menu for Subscribers

The following screen shot shows the omnibar as it might appear for a user who is not subscribed to re:Search®NM Pro or re:Search®NM Premium.

Figure 4.2 – Omnibar Options and re:Search®NM Menu for Non-Subscribers

The following table describes the re:Search®NM menu and the menus and buttons on the omnibar.

Menus and Icons	Description
re:SearchNM	Click the re:Search®NM logo to display or return to the *Dashboard*. To save room, the logo changes to a smaller logo when you view re:Search®NM on a mobile device or resize your browser window to make it smaller. Subscribers to re:Search®NM Pro or re:Search®NM Premium, will see a re:Search®NM logo that reflects their subscription status.
Upgrade	Click this button to open the *Pricing* page and learn more about re:Search®NM subscriptions. **Note: This button is not displayed if you are already a subscriber.**

Menus and Icons	Description
	Click this button to open the Help menu. The Help menu provides access to the following help options: • **FAQs**—Click this option to display the *Frequently Asked Questions* page. • **GoToAssist**—Click this option to use Tyler's GoToAssist tool, which allows a Tyler customer support representative to see and, if necessary, remotely operate your computer. Use this option only if directed to do so by your Tyler customer support representative. • **Keyboard Shortcuts –** click this option to see a display of the keyboard shortcuts that can be used in re:Search®NM • **Support Center –** click this option to navigate to the Tyler Technologies support center
	**Feedback**—Click this option to provide feedback to Tyler Technologies. This option appears on the Help menu only when you view re:Search®NM on a mobile device. Otherwise, the Feedback button  is displayed directly on the omnibar.
	**Application Launcher** - Click this button to open the Application Launcher, and then click the logo for your File & Serve™ application to open the application in a new browser tab.
	**Profile** - Click the button with your initials to display the Profile menu. The Profile menu displays your user name and email address, and includes links for changing your password and signing out. 
	Click this **Menu** button to display the re:Search®NM menu. The re:Search®NM menu includes the following options. Only those relevant to your user profile or subscription will display: • **Dashboard**—Opens the *Dashboard*. • **Search**—Opens the *Search* pages. • **Advanced Search** – Opens the *Advanced Search* page. • **My Cases**—Opens the *My Cases* page (non-firm users only). • **My Hearings**—Opens the *My Hearings* page (non-firm users only). • **Case Alerts**—Opens the *Case Alerts* page. • **Name Alerts**—Opens the *Name Alerts* page. • **Search Alerts**—Opens the *Search Alerts* page. • **Purchases**—Opens the *My Purchases* page. • **My Account**—Opens the *My Account* page. • **Upgrade**—Opens the *Pricing* page. This menu option is available only to non-subscribers in locations that support subscriptions.

5 Dashboard

Topics covered in this chapter

The *Dashboard is* comprised of a set of cards that display current information and provide access to related functionality. Some cards are available only to attorneys and pro se, while other cards are available only to subscription users.

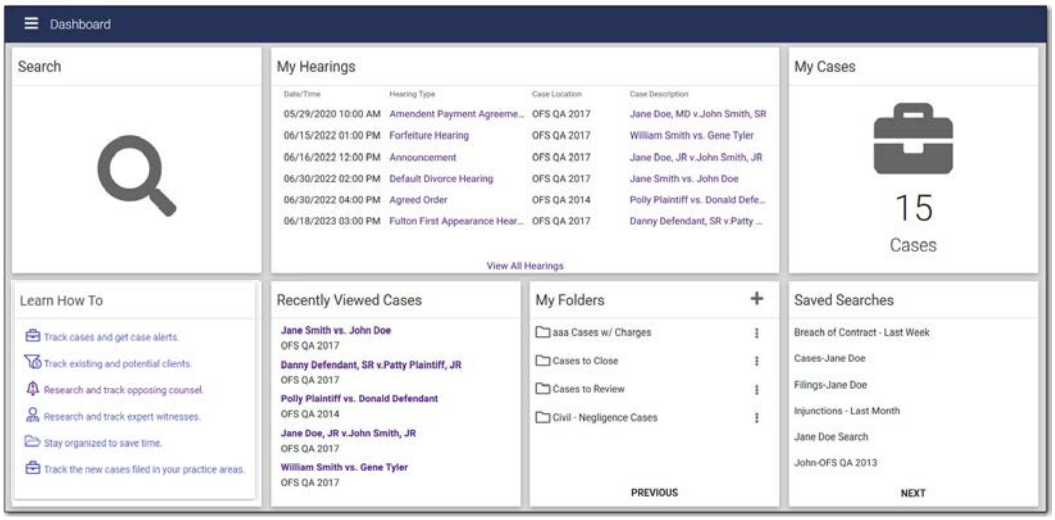


Figure 5.1 – Dashboard example

Note: The appearance, position, and relative size of the menu options and cards vary based on the device you are using. For example, on a small mobile device, the cards are arranged vertically and are sized to fit a smaller screen. The screen shot shown here is from a full-sized monitor.

Dashboard Cards

Card	Description
Search	You can use the search field in this card for a basic search, or click on the **magnifying glass** icon to go the *Basic Search* page, or click on the **Advanced Search** button to go to the *Advanced Search* page.
My Hearings (for Attorneys or Pro Se)	This card is available to attorney or Pro Se users. It displays the start date and time, hearing type, case location, and case description for upcoming hearings associated with the user's cases. Canceled hearings are displayed in italic, strikethrough type. Click the hearing type to display a hearing summary, and click the case description to display the *Case Description* page for the case. This card can display up to seven hearings. To view all upcoming hearings, click **View All Hearings**.

Card	Description
My Cases (for Attorneys or Pro Se)	This card is available to attorney or Pro Se users. It displays the number of cases on which you are an attorney or pro se. Click the card to open the *My Cases* page.
Filing Feed for My Cases (for Attorneys or Pro Se)	This card is available to attorney users. It lists recent e-filing transactions related to your cases. Click a filing to open the *Filing Details* page for that filing.
Recently Viewed Cases (Subscription)	This card is available through a subscription and displays recently viewed cases for quick access. Click a case to open the *Case Details* page for that case.
My Folders (Subscription)	This card is available through a subscription and displays the folders that you have created for holding specific cases that you want to access easily. Click a folder to open the folder, click + to create a new folder, or click ⋮ to rename or delete a folder.
Saved Searches (Subscription)	This card is available through a subscription and displays your previously saved searches. To perform a saved search, click the name of the saved search. The *Search* page will open and display the search results automatically.
Case Alerts (Subscription)	This card is available through a subscription and displays case alerts you have set up.
Name Alerts (Subscription)	This card is available through a subscription and displays name alerts you have set up.
Search Alerts (Subscription)	This card is available through a subscription and displays search alerts you have set up.
Subscription Preview Cards	Greyed-out cards provide previews of features included in subscriptions or demonstrations of upcoming features.

6 Searching for Cases, Filings, and Documents

Topics covered in this chapter

- Dashboard Search Card
- Basic Search Page
- Searching for Cases and Filings
- Searching for Documents
- Saving Searches
- Applying Saved Searches
- Deleting Saved Searches

Dashboard Search Card

The Search card on the Dashboard provides three ways to search:

1. Quick Search field – when you have the case number, party name, attorney name, or judge name
2. Go to the Basic Search screen – when you want to use filters on your search or search results
3. Go to the Advanced Search screen – when you want to perform a more complex search

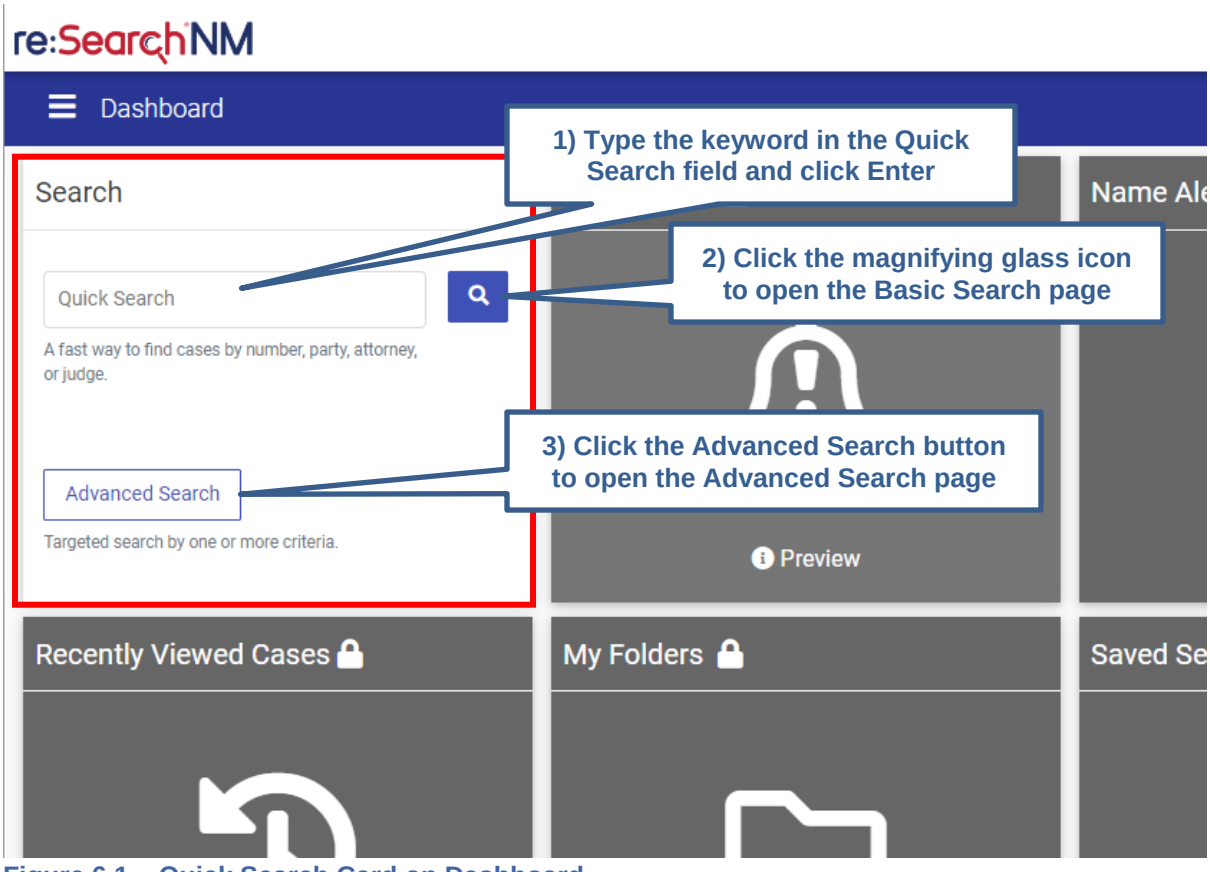


Figure 6.1 – Quick Search Card on Dashboard

Note: The searching capabilities of re:Search®NM do not require the dashes, capitalization, or leading zeros in order to return results on a search. For hints on how to formulate your search, go the Basic Search screen.

Basic Search Page

The *Basic Search* page is where you can perform simple keyword searches, filtered searches, or any combination of searches to locate cases, filings, or hearings.

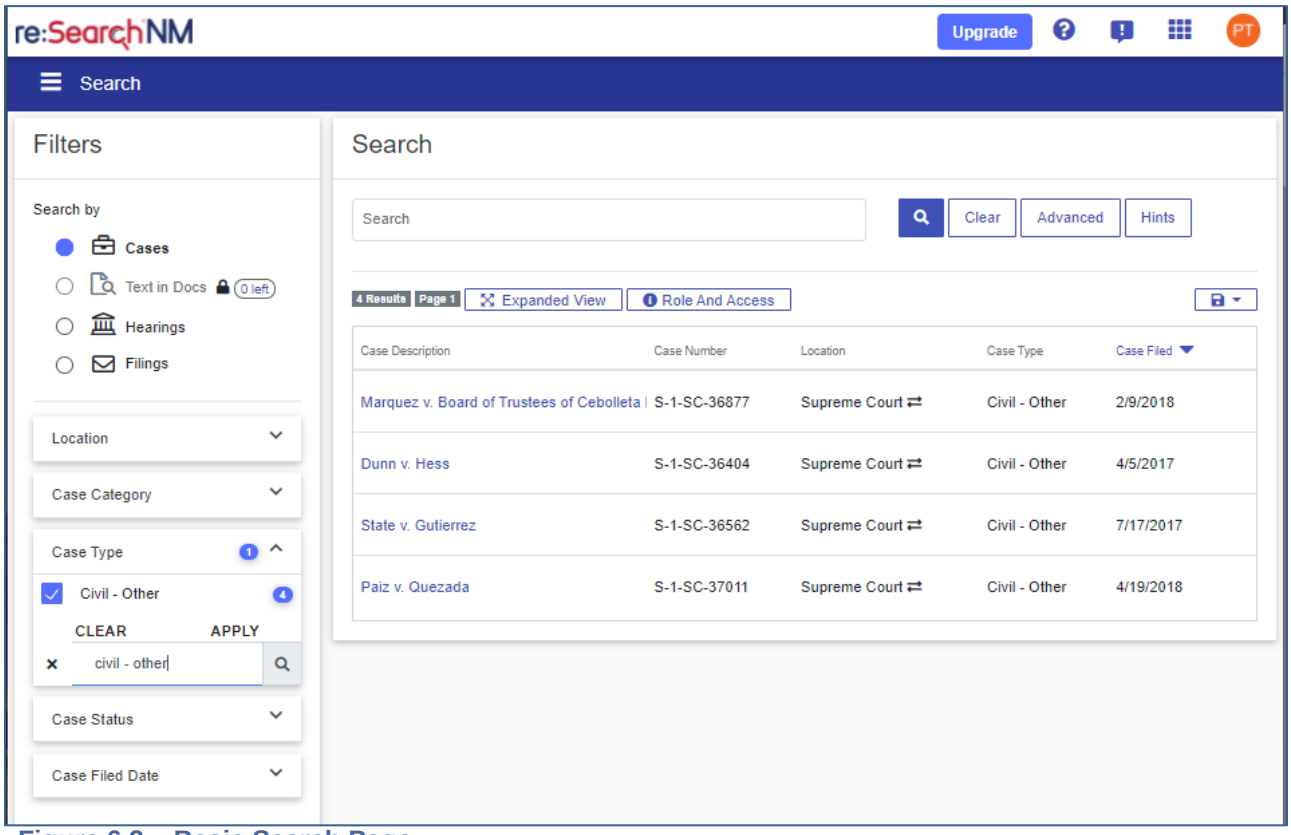


Figure 6.2 – Basic Search Page

Filter Using the Search By Buttons

Use the **Search By** buttons to select the type of search that you want to perform.

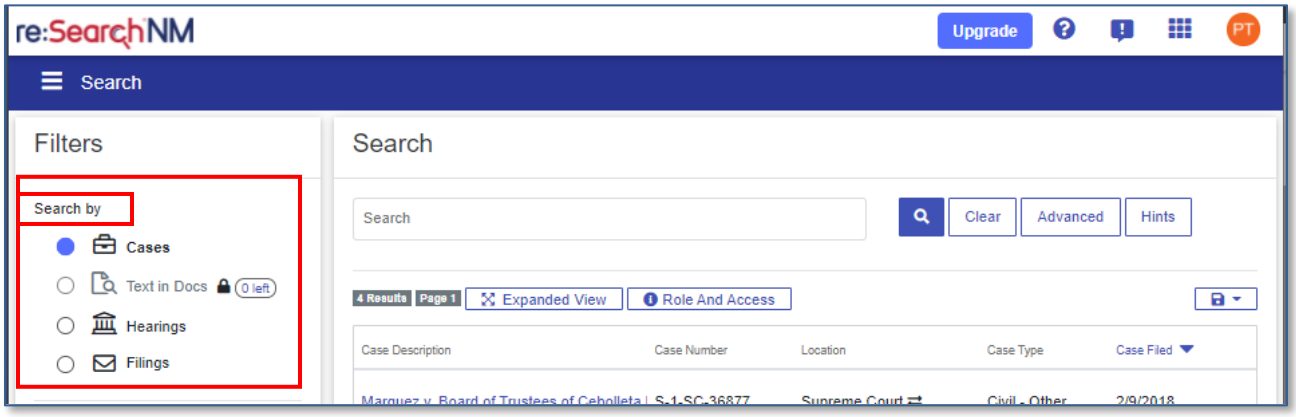


Figure 6.3 – Search By Buttons

Button	Description
Cases	Click **Cases** to search for cases.
Text in Docs	Click **Text in Docs** to search for text in documents (subscription feature).
Hearings	Click Hearings to search for hearings.
Filings	Click **Filings** to search for filings.

Keyword Search Field

Use the **Search** field to perform simple keyword searches. Keywords can include any item of information associated with a case, party, attorney, or filing, such as a case number, party name, attorney name, attorney number, or location. You can use the **Search** field in conjunction with the filter options. For example, you may want to search for cases for a particular defendant and then use the filter options to narrow the results by location or case type.

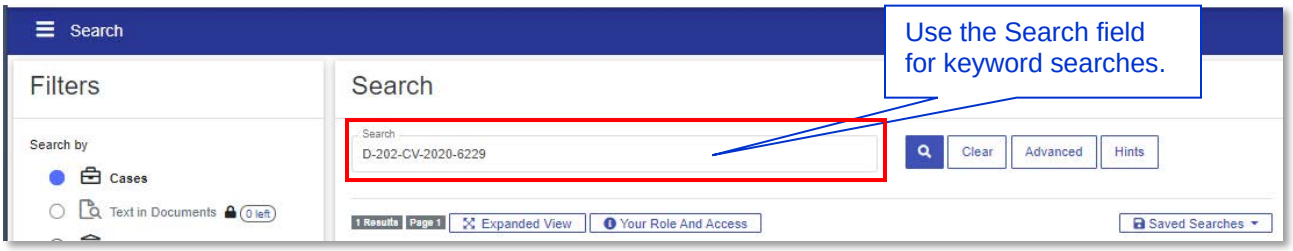


Figure 6.4 – Search Field

Case Numbers with Hyphens (Dashes) or Leading Zeros

You do not need to enter the dashes or leading zeros when searching on a case number.

Note: Click the Hints icon to display a list of search operators.

Figure 6.5 – Search Hints Dialog Box

Search Operators

The **Search** field supports the following search operators.

Operator	Example	Description
" "	"D-202-CR-2009-99999"	The results must contain exact matches.
AND	probate AND will	The results must contain both “probate” and “will.”
OR	affidavit OR testimony	The results must contain either “affidavit” or “testimony,” but not both.
NOT	civil NOT probate	The results must contain “civil,” but not “probate.”
*	Jon*	Use an asterisk (*) as a wildcard at the end of a search term. In this example, use “Jon*” to search for “Jon,” “Jonathon,” or “Jonathan.”
“ “~n	“pay structure”~2	Find matches that have “pay” and “structure” no more than two words apart. You must specify at least two keywords in quotation marks.

Filter Options

The filer options listed on the left side of the *Search* page can be applied before or after results are displayed. The available filter options are different for cases, filings, and hearings.

After you select a filter option within a filter category, **Apply** and **Clear** buttons are displayed directly above the **Search** field within the filter category (not the **Search** field at the top of the **Search** page). Then, after you finish selecting your filter options, you can click **Apply** to apply the filter options, or you can click **Clear** to clear the filter options.

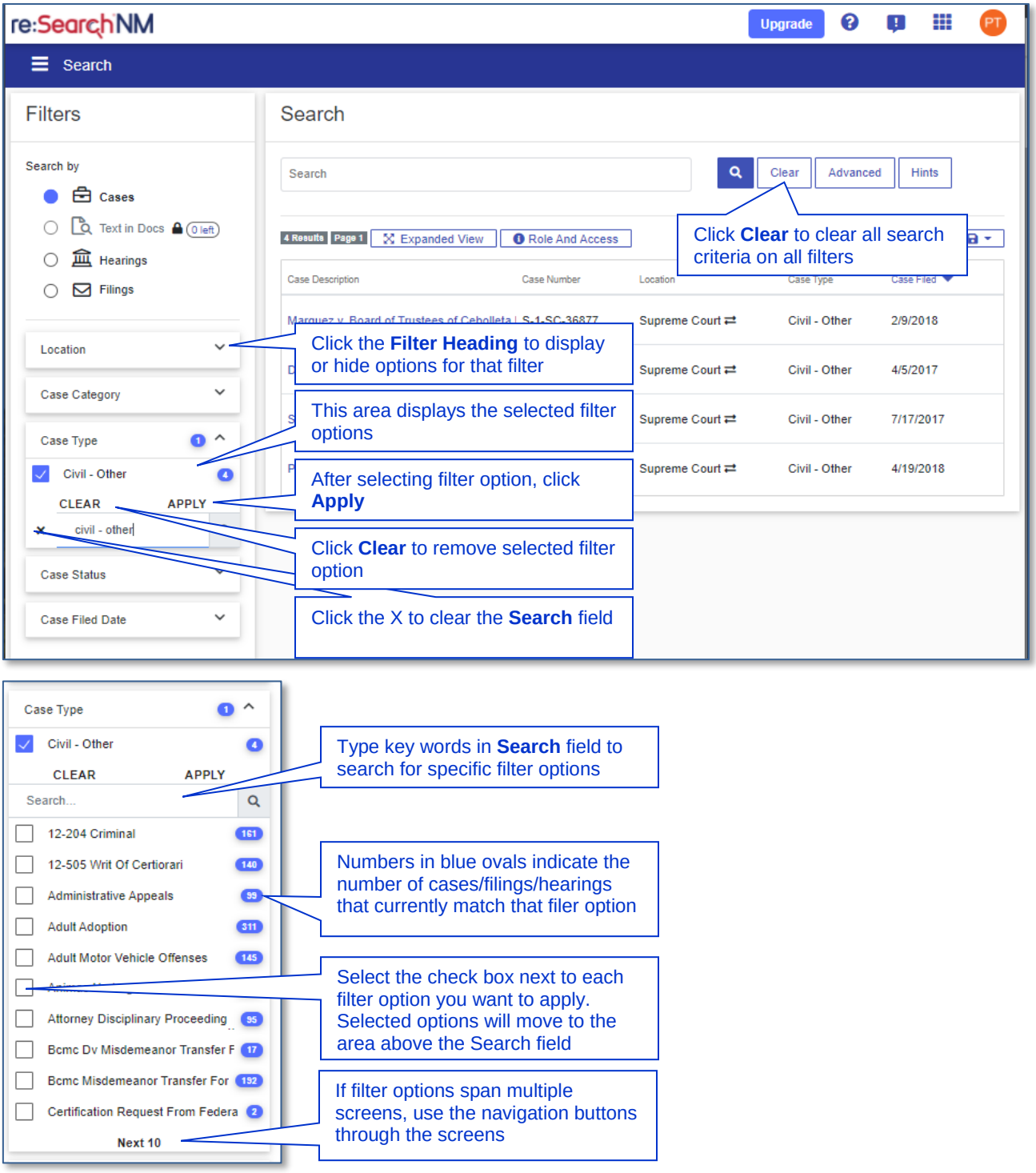


Figure 6.6 – Filter Options for Cases

If you cannot see the entire name of a filter option, simply hover your mouse pointer on the option, and re:Search®NM will display it in a tooltip as shown in the following screen shot.

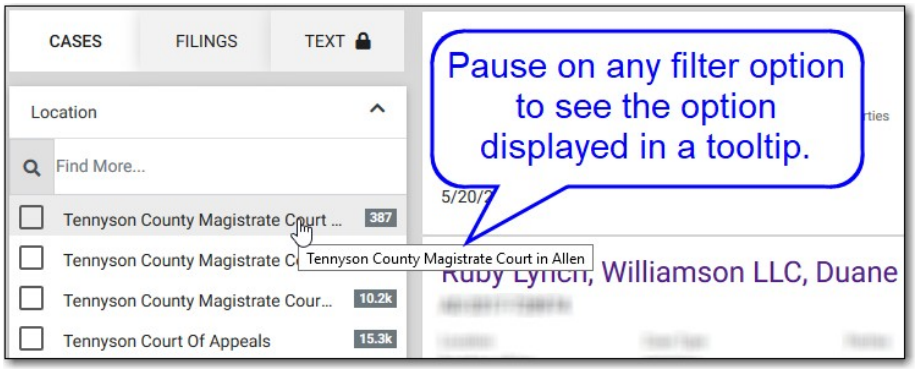


Figure 6.7 – Tooltip for Filter Option

When you select a filter option, the filter is applied automatically, unless the Apply button is displayed. In addition, the selected filter option moves to the top of the filter option list so that you can more easily review which options you have selected and clear any, if necessary.

Option	Description
To filter by location:	a. Click the **Location** filter category to display the available locations. b. Select one or more locations, and then click **Apply**. If necessary, click **Next** and **Prev** to scroll through the available locations. You can also start typing the location in the **Find More** field and then select the location when it is displayed. Matching locations are displayed as you type.
To filter by case category:	a. Click the **Case Category** filter category to display the available case categories. b. Select one or more case categories, and then click **Apply**. If necessary, click **Next** and **Prev** to scroll through the available categories. You can also start typing the category in the **Find More** field and then select the category when it is displayed. Matching categories are displayed as you type.
To filter by case type:	a. Click the **Case Type** filter category to display the available case types. b. Select one or more case types, and then click **Apply**. If necessary, click **Next** and **Prev** to scroll through the available case types. You can also start typing the case type in the **Find More** field and then select the case type when it is displayed. Matching case types are displayed as you type.
To filter by case status (Cases only):	a. Click the **Case Status** filter category to display the available case statuses. b. Select one or more case statuses, and then click **Apply**.

Option	Description
To filter by case filed date:	a. Click the **Case Filed Date** filter category to display the predefined date ranges. b. Select one or more of the following predefined date ranges: • In The Last Year • In The Last Month • In The Last Week • Yesterday • Today c. Click **Apply**. To specify your own date range, perform the following steps: a. Click **Choose Dates**. b. Click **From Date**, and then select a beginning date from the calendar that is displayed. c. Click **To Date**, and then select an end date from the calendar that is displayed. To use the current date, leave this field blank. d. Click **Search**.
To filter by filing type (Filings only):	a. Click the **Filing** filter category to display the available filing types. b. Select one or more filing types, and then click **Apply**. If necessary, click **Next** and **Prev** to scroll through the available filing types. You can also start typing the filing type in the **Find More** field and then select the filing type when it is displayed. Matching filing types are displayed as you type.
To filter by file date (Filings only):	a. Click the **File Date** filter category to display the predefined date ranges. b. Select one or more of the following predefined date ranges: • In The Last Year • In The Last Month • In The Last Week • Yesterday • Today c. Click **Apply**. To specify your own date range, perform the following steps: a. Click **Choose Dates**. b. Click **From Date**, and then select a beginning date from the calendar that is displayed. c. Click **To Date**, and then select an end date from the calendar that is displayed. To use the current date, leave this field blank. d. Click **Search**.

Search Results

Search results are displayed in the center of the *Search* page in either a Table View or the Expanded View. Use the **Expanded View** button to toggle between the views.

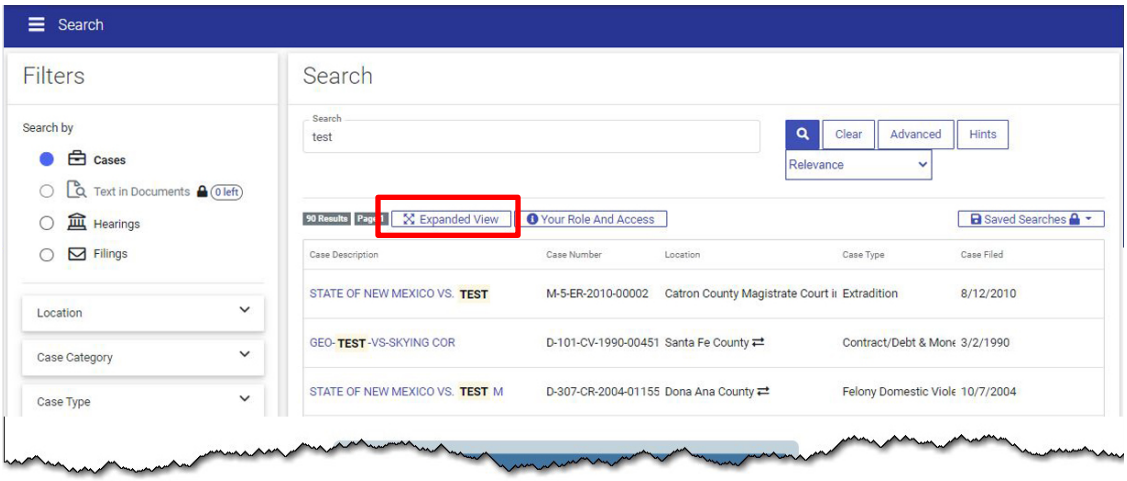


Figure 6.8 – Search Results in Table View

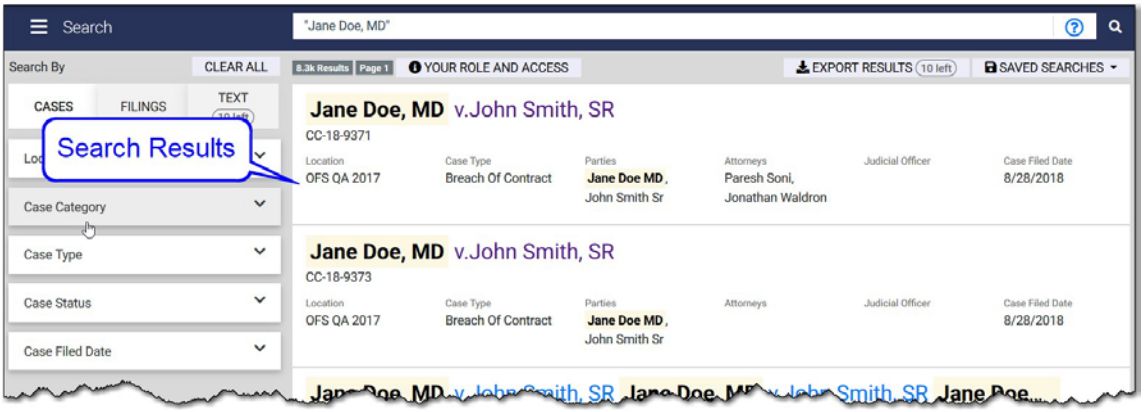


Figure 6.9 – Search Results in Expanded View

If re:Search®NM finds any matches, it displays them in the search results area. The search results may span across multiple pages.

When you select a filter option, the filter is applied automatically, unless the **Apply** button is displayed. In addition, the selected filter option moves to the top of the filter option list so that you can more easily review which options you have selected and clear any, if necessary.

Note: To clear a filter option, select it again. To clear all filter options for a particular filter category, click the Clear button that appears directly above the selections.

Information Displayed for Cases, Filings, and Hearings

For cases, the following information, if available, is displayed for each case:

- Case title
- Case number
- Location
- Case type
- Parties

- Attorneys
- Judicial officer
- Case filed date

For filings, the following information, if available, is displayed for each filing:

- Filing type
- Case type
- Location
- Case number
- Case title
- Case filed date
- Filing filed date

Note: The case title is a link to the *Case Details* page in re:Search®NM .

Search Results Navigation Buttons

If the search results span multiple pages, navigation buttons are displayed at the bottom of the page.

Figure 6.10 – Search Results Navigation Buttons

Shortcut Menu for Case and Filing

If you want to open the *Case Details* page or the *Filing Details* page in a new browser tab or window, right-click the link to open the shortcut menu, and then select **Open link in new tab** or **Open link in new window**. Depending on your browser, other options may be available.

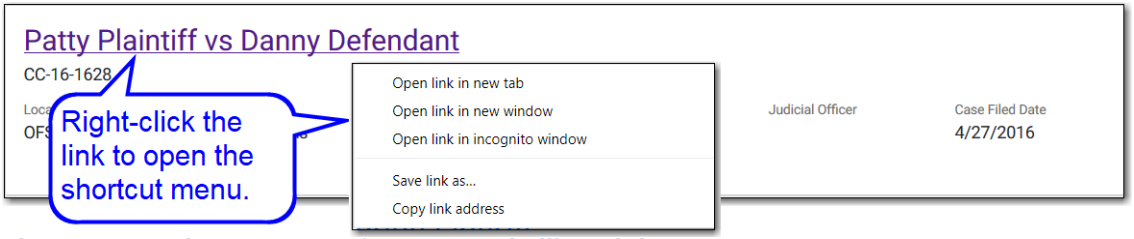


Figure 6.11 – Shortcut Menu for Case and Filing Links

Viewed Links vs. Unviewed Links

After you click a case or filing link, the link changes from blue to purple. This is useful because when you return to the *Search* page, it tells you at a glance whether you previously viewed the case or filing. This functionality is available anywhere in re:Search®NM that lists cases.

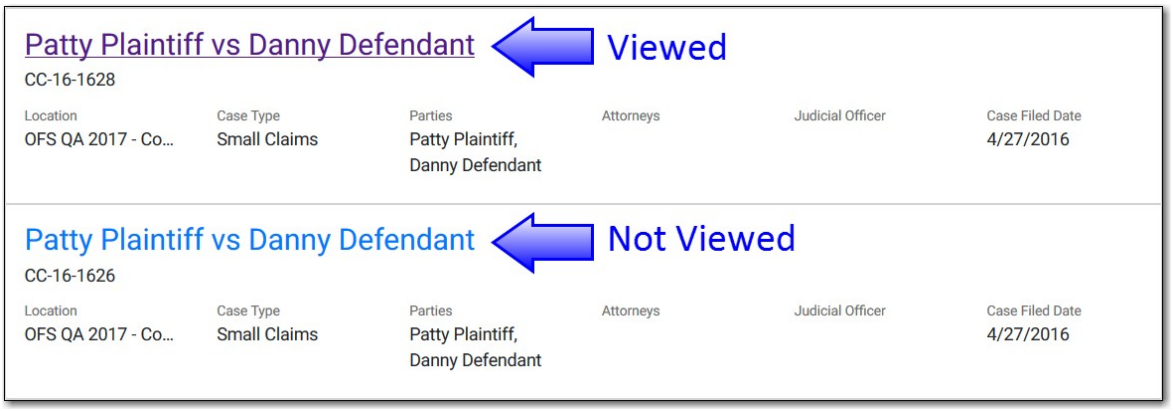


Figure 6.12 – Viewed Links vs. Unviewed Links

Note: This functionality is not supported in the Microsoft® Internet Explorer® or Edge® browsers.

Your Role and Access Button (for Attorneys and Pro Se)

If you cannot find certain cases, filings, or documents, it may be because re:Search®NM cannot display them for you because of your user role or relation to the case. To learn more, click the **Your Role and Access** button to open a window with details about your user role and the level of access that your role allows you in re:Search®NM.

Figure 6.13 – Your Role and Access Button on Search Page

7 Case Details and Filing Details

Topics covered in this chapter

Case Details Screen

Clicking into a case from the case search results will open the *Case Details* page. The *Case Details* page displays key information about the case, the parties and attorneys connected to the case, and all related filings. Although it is not shown in the following example, charge and hearing information can also be displayed.

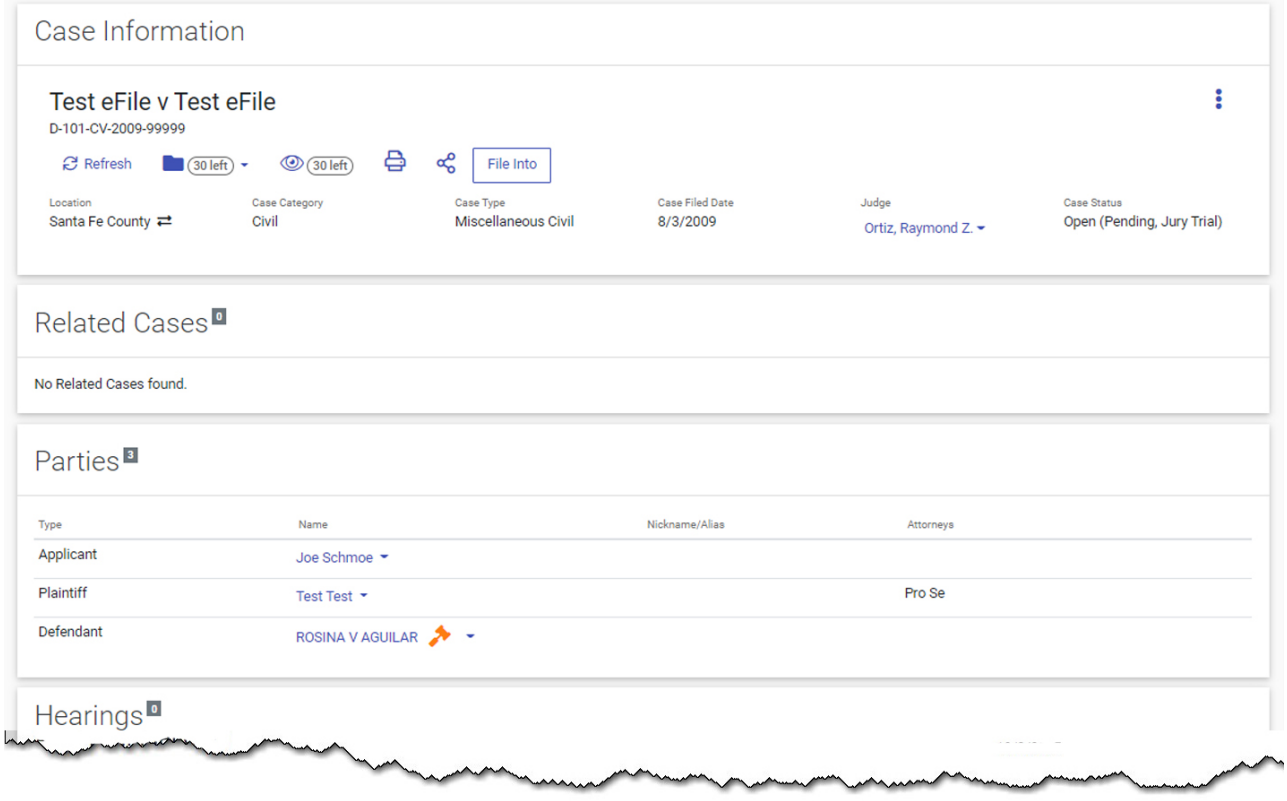


Figure 7.1 – Case Details Page

Case Information Section

On both the *Case Details* page, the **Case Information** section displays information about the case.

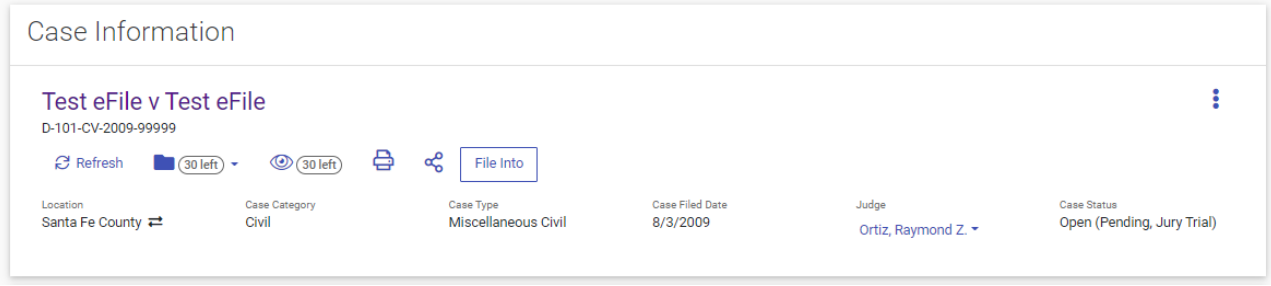
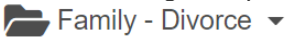


Figure 7.2 – Case Information Section on the Case Details Page

Case Information Section Details and Options

The following fields and options are included in the **Case Information** section.

Field/Option	Description
Case Description	The case description is the name or title of the case. On the *Filing Details* page, you can click the case description to display the *Case Details* page for the case. This link is available only on the *Filing Details* page. **Note: If a case description is not available for any reason, re:Search®NM uses the case number for the case description.**
Case Number	The case number is the number assigned to the case by the court.
Location	The location is the court to which the case is assigned.
Case Category	This field displays the case category. Depending on how cases are categorized in your location, categories may include the following: • Appellate • Criminal • Civil • Family • Probate or Mental Health
Case Type	The case type is the type of case within the case category.
Case Filed Date	The case-filed date is the date on which the case was filed.
Interim Conditions	This field is used for displaying interim conditions on criminal cases. The **Conditions** field is displayed any time charges are linked to the case, even when no interim conditions have been added. If a **View** link is displayed in the **Conditions** field, interim conditions have been added to the case. Click the **View** link to display details about the interim conditions. If a hyphen (-) is displayed in the **Conditions** field, no interim conditions have been added to the case.

Field/Option	Description
Judge	The judicial officer is the judge to whom the case is assigned. Click the judicial officer's name to open the Name Options menu. From the Name Options menu, you can do the following: • Select **Search** to search for other cases or filings with the same judicial officer. **Note: If a judge has not been assigned, this field is not displayed.**
Case Status	The case status indicates whether the case is open or closed according to the re:Search®NM system. In parenthetically, the Odyssey case status will display. The case status can be one of the following: • **Open**—The case is open. • **Closed**—The case is closed. • **Unknown**—The case status is unavailable.
	A Gavel icon ) is displayed when the case is sealed to other users.
	The Refresh case link will make a request from the Odyssey database to pull over case data that may not be displaying yet. After clicking this link, the case data will normally refresh within 10 minutes.
	With a subscription, you can use this drop-down list to save the case to a folder on the **My Folders** card on the *Dashboard*. You can create a new folder at the same time by entering a folder name in the **New Folder Name** field. If you have already saved the case to a folder, the name of the folder is displayed, as shown in the following example: 
 **(case alert not set)**  **(case alert set)**	With a subscription, click the Case Alert icon to set or remove a case alert. The Case Alert icon is white ) when a case alert is not set, and the icon is dark ) when a case alert is set.
	Click the Print View icon ) to display a "register of actions" view of the *Case Details* page that is optimized for printing. The print view opens in a new tab or browser window, depending on your browser. **Note: When you view re:Search®NM on a small mobile device or resize your window to make it smaller, the Print View icon becomes the Print View option on the More Options menu ⋮) to save room.**
	Click the Share Case icon ) to open the *Share Case* dialog box, and then choose one of the following options: • Click **Copy** to copy a link to the *Case Details* page to your clipboard. You can then paste the link into any email, text message, spreadsheet, or other document that you choose. • Click **Email** to start an email. The email will include a subject in the subject line and a link to the *Case Details* page in the body of the email. You can change the subject or modify the body of the email before sending it. **Note: The recipient of this link will only be able to open it if they have a re:Search®NM account and have the same rights to view the case type.**

Field/Option	Description
File Into	Attorneys who are New Mexico File & Serve users can click this button to file into the case. re:Search®NM will open File & Serve and populate a new envelope with the case information for you complete and submit.

Filing into Cases

For Filing Attorneys

If you would like to e-file documents into existing cases, you can start the process in the **Case Information** section on either the *Case Details* page or the *Filing Details* page. re:Search®NM then directs you to your File & Serve account with a new envelope populated and ready for you to complete and submit.

Note: If you signed in to re:Search®NM with your Odyssey File & Serve credentials,, re:Search®NM will open a new tab and sign you in to that account and then directly access the case.

Related Cases Section

On the *Case Details* page, the **Related Cases** section displays cases that have been related to this case on the Odyssey case record.

The section will display:

- Case Filed Date
- Case Number
- Case Style
- Location
- Case Type
- Related Reason

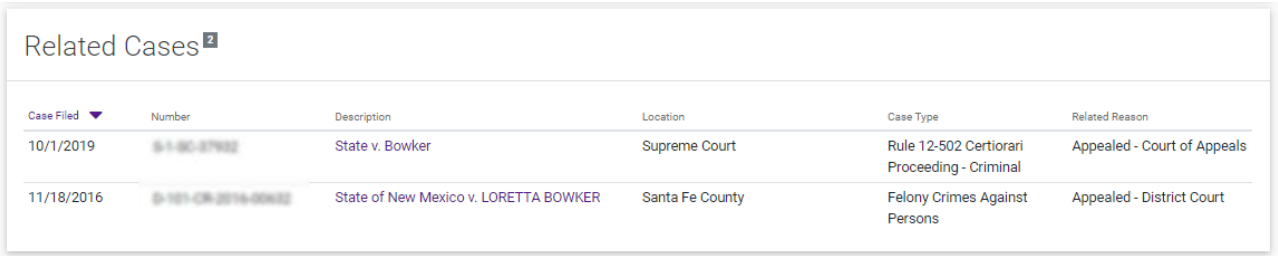


Figure 7.3 – Related Cases Section on Case Details Page

If the user's account has rights to the related case type, they can click the **Case Title** link to open the case. If the user's account does not have rights to the related case type, clicking on the **Case Title** link will display a message indicating the case was not found.

Charges Section

On the *Case Details* page, the **Charges** section displays for criminal cases:

- The Sequence Number
- The offense date
- The Charge description
- The Statute Number (if available)
- The Degree
- The Disposition (if available)

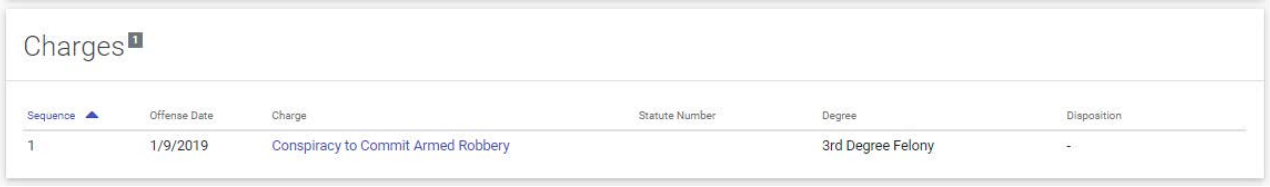


Figure 7.4 – Charges Section on the Case Details Page

re:Search®NM can display up to 10 charges in the **Charges** section at one time. If more than 10 charges are linked to the case, navigation buttons are displayed to allow you to browse through the charges.

Clicking the charge description displays a summary of the charge.

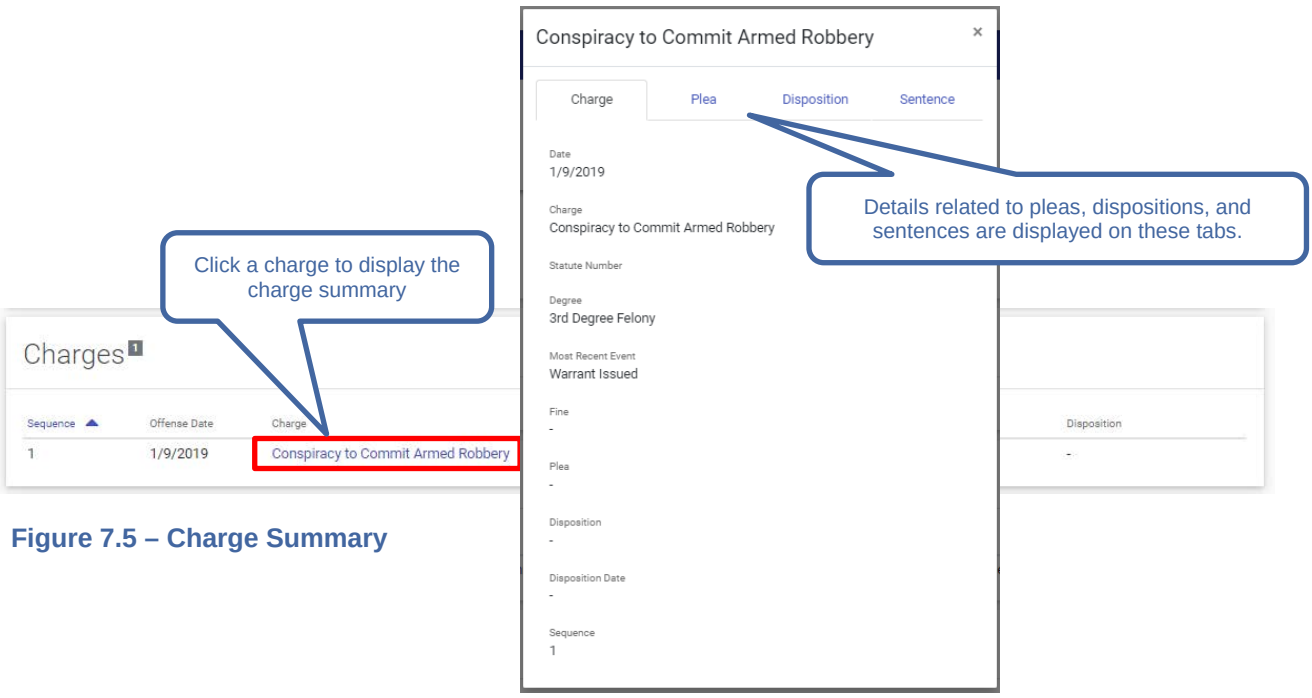


Figure 7.5 – Charge Summary

Charges Section Details

The **Charges** section displays charge details in columns. The following details, when available, are displayed for each charge.

Column/Option	Description
Sequence Number	This column displays the sequence number.
Offense Date	This column displays the date of the offense. Clicking the column heading sorts the charges in ascending or descending order by offense date.
Charge	This column displays the charge description. Click the charge description to display the charge summary.
Statute	This column displays the statute number.
Degree	This column displays the offense degree for the charge.
Disposition	This column displays the disposition for the charge.

Charge Summary Details

The Charge Summary dialog window has four tabs:

- Charge
- Plea
- Disposition
- Sentence

Charge Summary Details—Charge Tab

When available, the following details are displayed on the **Charge** tab of the charge summary.

Field	Description
Date	This field displays the date when the offense was committed.
Charge	This field displays the charge brought against the defendant connected to the case.
Field	**Description**
Statute Number	This field displays the statute number for the charge.
Degree	This field displays the degree of the charge.
Most Recent Event	This field displays the last docketable event (plea, disposition, sentence, etc.) entered on the charge.
Fine	This field displays the applicable fine, if any.
Plea	This field displays the plea entered on the charge.
Disposition	This field displays the disposition entered on the charge.
Disposition Date	This field displays the date on which the disposition was entered on the charge.
Sequence	This field displays the sequence number.

Charge Summary Details—Plea Tab

When available, the following details are displayed on the **Plea** tab of the charge summary.

Field	Description
Plea	This field displays the plea entered on the charge.
Plea Date	This field displays the date on which the plea was entered on the charge.
Plea Judge	This field displays the name of the judge assigned to the case when the plea was entered on the charge.
Jury Trial Demand Date	If applicable, this field displays the date on which the jury trial will be held.
Speedy Trial Demand	If a speedy trial will be held for the defendant, this field displays the status of the speedy trial.
Speedy Trial Demand Date	If applicable, this field displays the date on which the speedy trial will be held.

Charge Summary Details—Disposition Tab

When available, the following details are displayed on the **Disposition** tab of the charge summary.

Field	Description
Disposition	This field displays the disposition entered on the charge.
Disposition Date	This field displays the date on which the disposition was entered on the charge.
Disposition Judge	This field displays the name of the judge assigned to the case when the disposition was entered on the charge.

Charge Summary Details—Sentence Tab

When available, the following details are displayed on the **Sentence** tab of the charge summary.

Field	Description
Sentence	This field displays the sentence entered on the charge.
Sentence Date	This field displays the date on which the sentence was entered on the charge.
Field	**Description**
Sentence Judge	This field displays the name of the judge assigned to the case when the sentence was entered on the charge.
Confinement	This field displays the conditions entered in Odyssey. If there is data, the header will be blue and a dropdown arrow will display on the right. If no data has been entered in Odyssey, the header will be grey.
Probation	This field displays the probation data entered in Odyssey. If there is data, the header will be blue and a dropdown arrow will display on the right. If no data has been entered in Odyssey, the header will be grey.
Fee Totals	This field displays the fee transactions entered in Odyssey. If there is data, the header will be blue and a dropdown arrow will display on the right. If no data has been entered in Odyssey, the header will be grey.
Condition	This field displays the conditions entered in Odyssey. If there is data, the header will be blue and a dropdown arrow will display on the right. If no data has been entered in Odyssey, the header will be grey.

Hearings Section

On the *Case Details* page, the **Hearings** section lists all hearings associated with the case (past, present, and future). If no hearings are associated with the case, the **Hearings** section will be blank.

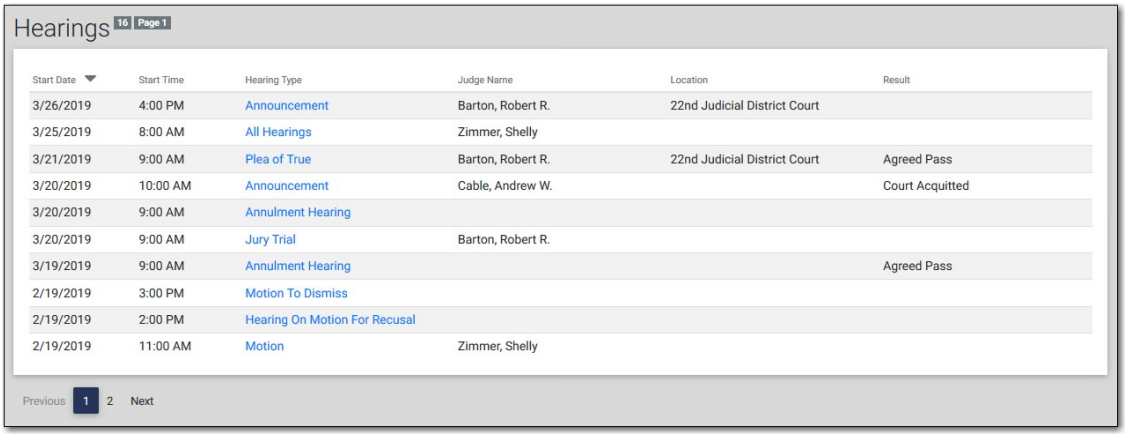


Figure 7.6 – Hearings Section on Case Details Page

re:Search®NM can display up to 10 hearings in the **Hearings** section at one time. If more than 10 hearings are associated with the case, navigation buttons are displayed to allow you to browse through the hearings. Clicking the hearing type displays a summary of the hearing.

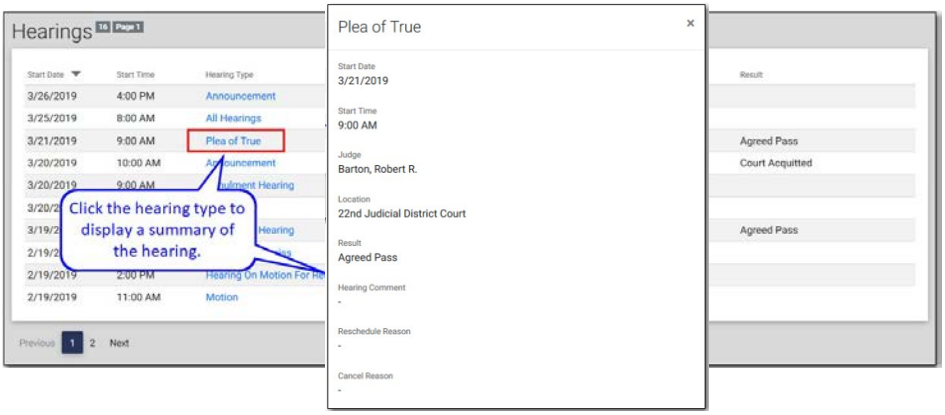


Figure 7.7 – Hearing Summary

Hearings Section Details

The **Hearings** section displays hearing details in columns. The following details, when available, are displayed for each hearing.

Column/Option	Description
Date/Time	This column displays the start date and time for the hearing. Clicking the column heading sorts the hearings in ascending or descending order by start date.
Hearing Type	This column displays the hearing type. Click the hearing type to display the hearing summary.
Judge Name	This column displays the name of the presiding judge.
Location	This column displays the court location if one has been entered in Odyssey..
Result	This column displays the hearing result or the cancel reason.

Hearing Summary Details

Click on the hearing type to display the Hearing Summary. When available, the following details are displayed on the hearing summary.

Field	Description
Hearing Type	The hearing type is displayed at the top of the summary.
Start Date	This field displays the date of the hearing.
Start Time	This field displays the time when the hearing starts.
Judge	This field displays the name of the presiding judge.
Location	This field displays the hearing location if one is entered in Odyssey..
Result	This field displays the hearing result.
Hearing Comment	If hearing comments are available, they are displayed in this field.
Reschedule Reason	If the hearing was rescheduled, this field displays the reason.
Cancel Reason	If the hearing was canceled, this field displays the reason.

Parties Section

On the *Case Details* page, the **Parties** section lists all unrestricted and unhidden parties, participants, and attorneys connected to the case.

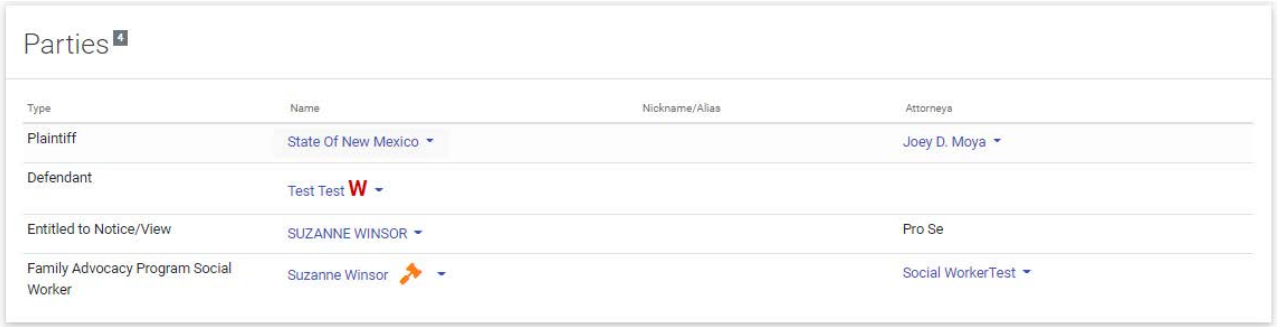


Figure 7.8 – Parties Section on Case Details Page

Parties Section Details and Options

The following fields and options are included for each party in the **Parties** section.

Field/Option	Description
Type	This field identifies the party's relationship to the case.
Name	This field displays the name of the party. Click the name to open the Name Options menu. From the Name Options menu, you can do the following: • Select **Party Case History** to see other cases this party is connected to. • With a subscription, select **Name Alert** to set a name alert. When you set a name alert, re:Search®NM notifies you by email whenever that name is added to a case. • Select **Search** to search for the party's other cases or filings.

Field/Option	Description
W	A party with an active warrant in the case will display the Warrant icon (W) next to the party name.
	For users with higher access, a Gavel icon) next to a party indicates that the party is marked as restricted for some users.
Nickname/Alias	If the party has a case party alias, it will display in this column.
Attorneys	This field displays the name of the attorney who represents the party. Click the name to open the Name Options menu. From the Name Options menu, you can do the following: • With a subscription, select **Name Alert** to set a name alert. When you set a name alert, re:Search®NM notifies you by email whenever that name is added to a case. • Select **Search** to search for other cases or filings with that attorney. The Name Options menu also displays the attorney's Supreme Court approved CAID number. If the party is representing themselves, and has been marked Pro Se in Odyssey, then Pro Se will display here.

Searching for Cases and Filings with Matching Party, Attorney, or Judge

You can use the **Parties** section of the *Case Details* page to generate a list of other cases and filings for a particular party, attorney, or judge.

To search for other cases and filings with the same party or attorney:

1. Access the *Case Details* page for the case.

   Note: If you are currently viewing the *Filing Details* page for a related filing, click View Case to access the *Case Details* page.

2. In the **Parties** section, do one of the following:.

   - To search for a party's other cases and filings, click the party's name in the **Name** column to open the Name Options menu, and then click **Search**.
   - To search for an attorney's other cases and filings, click the attorney's name in the **Attorneys** column to open the Name Options menu, and then click **Search**.

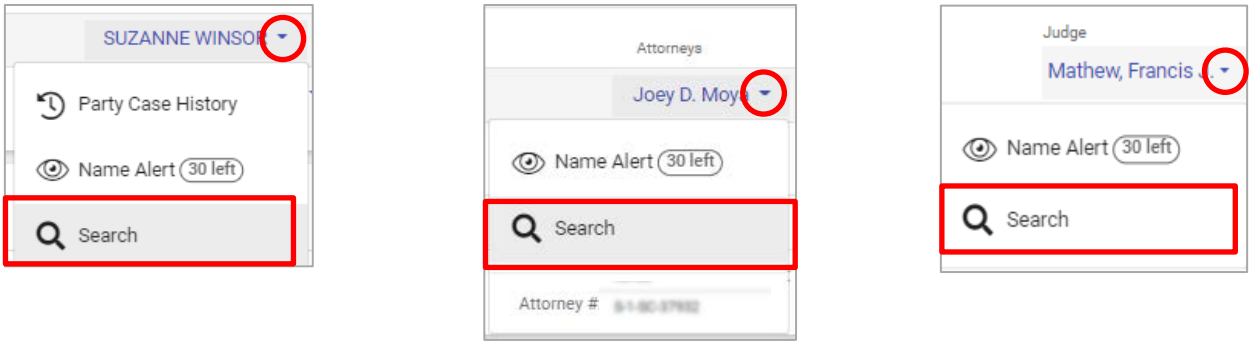


Figure 7.9 – Parties Section Search on Party, Attorney, or Judge

re:Search®NM opens a new browser tab and displays all cases with a matching party or attorney.

3. If you want to see a list of filings with a matching party or attorney, from the search results, click the **Filings** “search by” radio button.

   re:Search®NM now displays all filings with the matching party or attorney from your original party search.

4. Click any case or filing in the search results to view details for that case or filing.

Events (Filings) Section

For New Mexico, the terms “events” and “filings” can be used interchangeably. Within re:Search®NM events are grouped and displayed in the Case Details view of the case.

On the *Case Details* page, the **Events** section displays information about all docketable events for a case. The number of events in the case is displayed next to the word **“Events”** on the section heading.

Figure 7.10 – Events Section on Case Details Page

Sort Order and Search Options

On the *Case Details* page, you can change the order in which the events are listed, and you can search for a specific event.

Field/Option	Description
Sort Order Date ▲	Select **Newest First** from the **Sort Order** drop-down menu to list the newest filings first. This option is the default sort order. Select **Oldest First** to list the oldest filings first.
Search in Events Search events	Use this field to search through the events attached to the case. Search criteria can include a filing code or description or a document file name or description.
Expect To See More Filings? Expect To See More Filings?	Click this button to display the *Expect to See More Filings on this Case?* dialog box, which lists reasons why you might not see all of the filings on the case. If necessary, you can use this dialog box to send feedback to Tyler Technologies customer support.
Select/Deselect All Select/Deselect All	Click this button to select or deselect all documents on the case. Use the checkbox on the right side of each event to individually select documents to download. Downloading documents is free in re:Search®NM .

Field/Option	Description
Download Selected 	After selecting all, click this button to download all of the selected documents to your PC.

Filing Search

Clicking into a filing from the Filing Search results will open he *Filing Details* page. The *Filing Details* page displays key information about the case and just one filing.

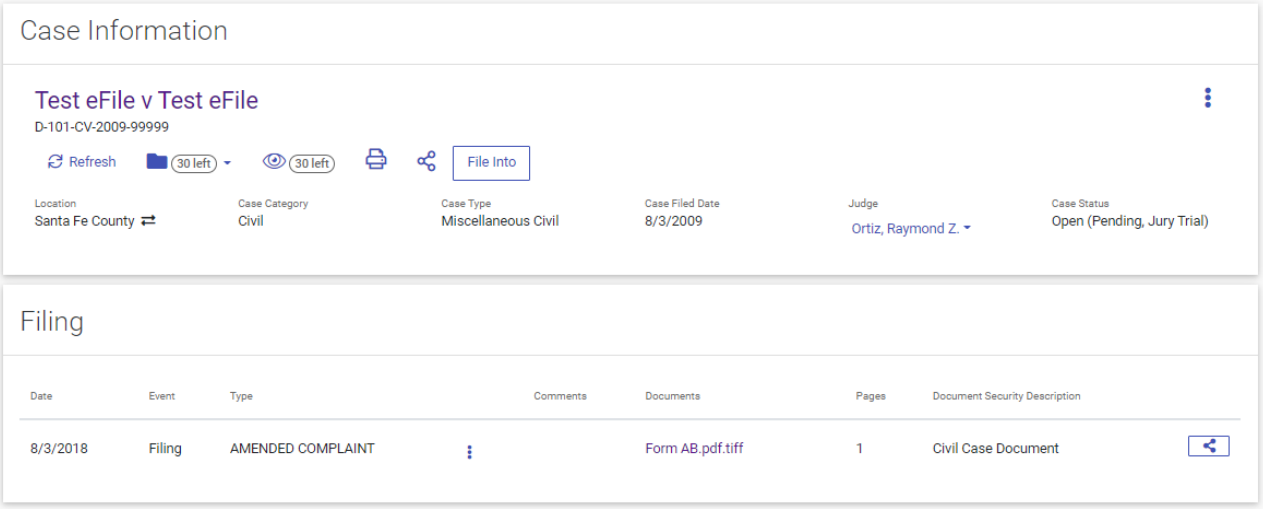


Figure 7.11– Filing Details Page

Filing Section Details and Options

After selecting a Filing from the results of a filings search, the **Filing** section displays information for only one filing beneath the Case Information section.

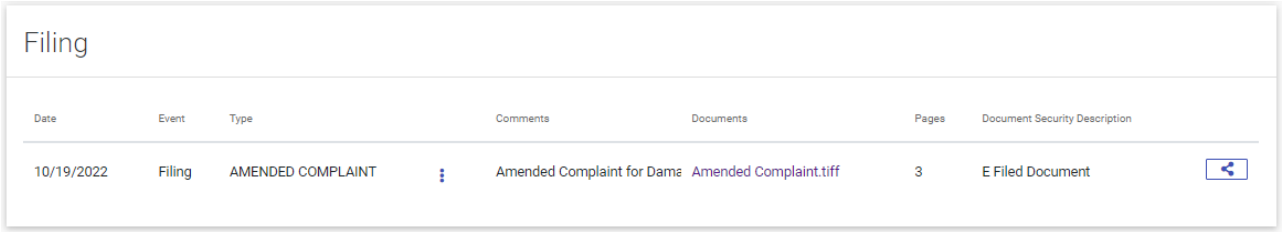


Figure 7.12 – Filing Section

Filing Section Details and Options

The following fields and options are included.

Field/Option	Description
Date	The date is the filing date on which the document was filed into the case.
Event	The Event indicates whether this is a Filing or a Hearing, or any other type of event displayed chronologically in the case.
Type	The document type, which is typically the Event the document is attached to.

Field/Option	Description
Filing Summary	The filing summary is a brief summary of the filing provided by the filer. If the filer did not provide a summary, this field is not displayed.
Name	This field displays the file name of the document attached to the filing. Click the file name to view the document. If you need to purchase the document first, clicking the file name displays a preview of the document instead of the entire document.
Comments	If comments were entered on the Event by the court, these will display here.
Documents	The document description will display.
Pages	This field displays the length of the document.
Document Security Description	This column displays the Document Security assigned by the court.

Viewing Documents

On the *Case Details* page and the *Filing Details* page, you can open documents that you have rights to view.

Documents are viewable, depending on your re:Search®NM user profile, your relationship to the case, your jurisdiction, or any combination of these factors as determined by the New Mexico Supreme Court. In some instances, a document may not be available because it has been marked as confidential or sealed by the state or a judge's order. If you have rights to view the document, it will display an active hyperlink that will download the file to your device when you click it.

To view documents:

1. Access the *Case Details* page for the case with the documents that you want to view.
2. Click on the document name to download it to your device.

Depending on the file type, your browser, and the type of PC or device that you are using, the document opens in a new browser tab, opens in a new window, or is downloaded to your PC or device and then opens. If the document does not open automatically, check your Downloads folder.

8 My Cases

For Attorneys and Pro

If you are an Attorney or Pro Se, the *My Cases* card on the Dashboard displays the total number of cases on which you are the Attorney of Record (AOR) or Pro Se (self-represented litigant.) By clicking on the card, the *My Cases* page displays your cases display as a list. You can also access the *My Cases* page by selecting **My Cases** from the re:Search®NM menu ☰).

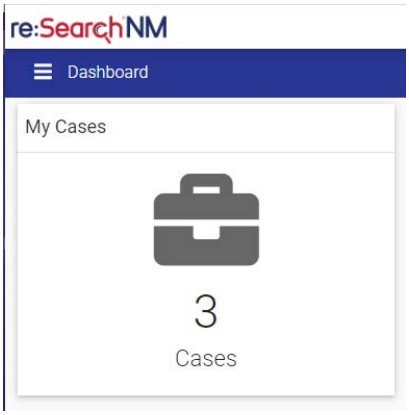


Figure 8.1 – My Cases Card on the Dashboard

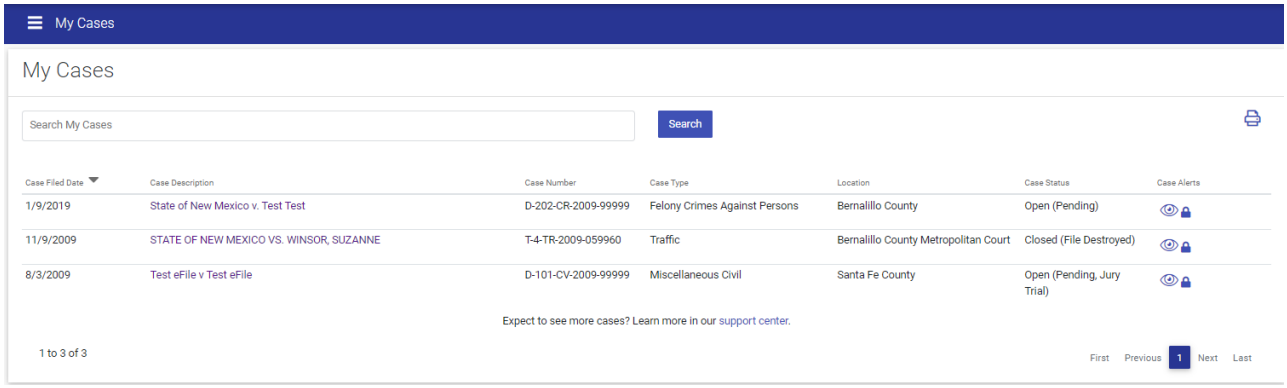


Figure 8.2 – My Cases Page

Cases are initially listed in chronological order by file date (the newest cases are listed first). The results can be in displayed in reverse date order by clicking on the Case Filed Date down arrow.

My Cases Page Details

The *My Cases* page displays the following information for each case.

Column	Description
Case Filed Date	The case-filed date is the date on which the case was filed.
Case Description	The case description is the name or title of the case. Click the case description to display the *Case Details* page for the case. **Note: If a case description is not available for any reason, re:Search®NM uses the case number for the case description.**
Case Number	The case number is the number assigned to the case by the court.

Column	Description
Case Type	The case type is the type of case within the case category.
Location	The location is the court to which the case is assigned.
Case Status	The current case status (the Odyssey status is in parentheses.) The case status is automatically updated when changes are made in Odyssey.
Case Alerts 	With a subscription, the icon displayed in this column indicates whether you are watching a case: • The Unwatched Case icon) is displayed if you are not currently watching the case. To begin watching the case, click the icon. • The Watched Case icon) is displayed if you are currently watching the case. To stop watching the case, click the icon. • The Unwatched Case icon with a solid lock is displayed when the user does not have this subscription service.

My Cases Page Options

The *My Cases* page includes the following options.

Option	Description
View Case Details	Click any case description to open the *Case Details* page for that case.
Search My Cases	Use this field to search for specific cases. Search criteria can include any of the case details displayed on the page as well as an attorney name or number.
Start or Stop Watching a Case	If you have a subscription, click to begin watching a case. Click to stop watching a case.
Expect to see more cases?	If you do not see all of your cases, click this link to open a help article that explains why your case may not be listed and what you should do to correct this problem.
First, Previous, 1, 2,..., Next, Last	Use these navigation buttons to browse through your cases.

9 My Hearings

For Attorneys and Pro

For Attorneys and Pro Se, the *My Hearings* page displays all of your upcoming hearings. You can access the *My Hearings* page by selecting **My Hearings** from the re:Search®NM menu ☰), or by clicking **View All Hearings** at the bottom of the **My Hearings** card on the *Dashboard*.

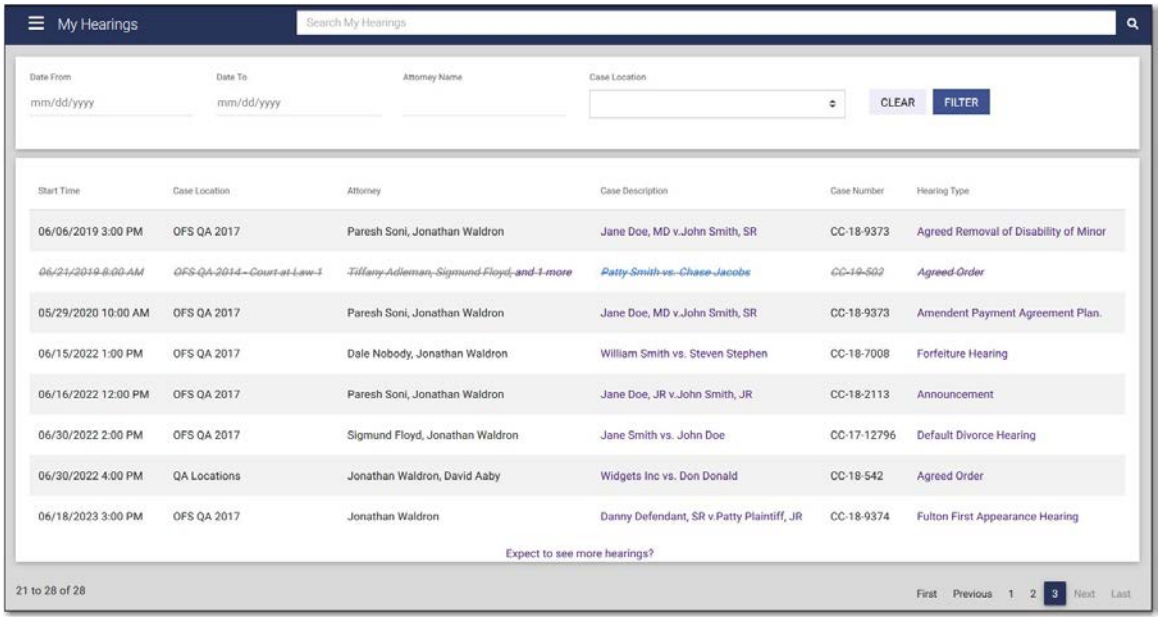


Figure 9.1 – My Hearings Page

Hearings are initially listed in chronological order by hearing date.

My Hearings Page Details

The *My Hearings* page displays the following information for each case.

Column	Description
Start Time	This column displays the start date and time for the hearing.
Case Location	The case location is the court to which the case is assigned.
Attorney	This column displays the attorneys representing the case.
Case Description	The case description is the name or title of the case. Click the case description to display the *Case Details* page for the case. **Note: If a case description is not available for any reason, re:Search®NM uses the case number for the case description.**
Case Number	The case number is the number assigned to the case by the court.
Hearing Type	This column displays the hearing type. Click the hearing type to display the hearing summary.

My Hearings Page Options

The *My Hearings* page includes the following options.

Option	Description
Search My Hearings	To search for a specific hearing, enter search criteria in the **Search My Hearings** field, and then click the Search icon ().
Filter Options	Use the filter options at the top of the *My Hearings* page to filter the list of hearings by court dates, attorney name or number, or case location, and then click **Filter** to apply the filter options that you selected. Click **Clear** to remove or reset the filter options that you selected.
View Case Details	Click the case description to open the *Case Details* page for the case.
View Hearing Summary	Click the hearing type to display the hearing summary.
Expect to see more hearings?	If you do not see hearings for some of your cases, click this link to display a brief message about why you might not see all of your hearings.
First, Previous, 1, 2,..., Next, Last	Use the navigation buttons to browse through your hearings.

10 Subscription Features (or advanced features)

Topics covered in this chapter

Saving Searches

If you perform the same searches over and over, you can save a search so that you do not have to reenter the same search criteria each time you perform the search.

To save a search:

1. Access the *Search* page by clicking the **Search** card on the *Dashboard* or by clicking **Search** on the re: Search menu).
2. Enter your search criteria.
3. Once you are satisfied with the search results, click **Saved Searches**.
4. Type a name for the search in the **New Name** field.

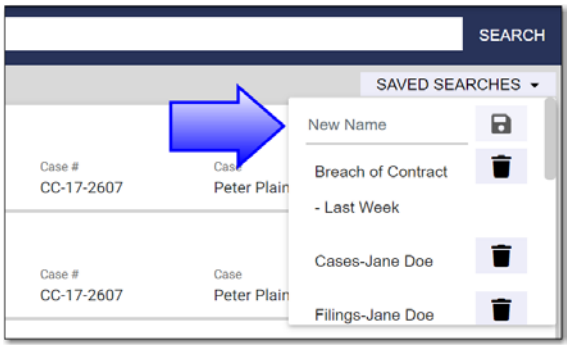


Figure 10.1 – New Name Field for Saved Search

5. Either click or press ENTER.

The search is then displayed on the **Saved Searches** card on the *Dashboard* under the name you specified.

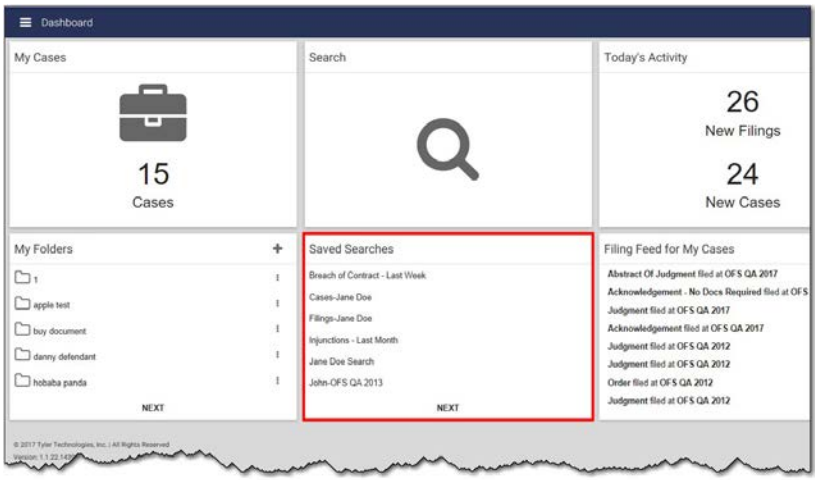


Figure 10.2 – Saved Searches Card

Applying Saved Searches

Once you have saved a search, you can initiate that search from either the Dashboard or the Search page. To apply a saved search:

Option	Description
On the Dashboard:	Click the saved search in the **Saved Search** card on the *Dashboard*.
On the *Search* page:	1. Access the *Search* page either by clicking the **Search** card on the *Dashboard* or by clicking **Search** on the re:Search®NM menu. 2. Click **Saved Searches**.

The saved search is performed automatically.

Deleting Saved Searches

If you no longer need a saved search, you can easily delete it.

To delete a saved search:

1. Access the *Search* page either by clicking the **Search** card on the *Dashboard* or by clicking **Search** on the re:Search®NM menu ( ).
2. Click **Saved Searches**.
3. Click next to the saved search that you want to delete, and the saved search is removed.

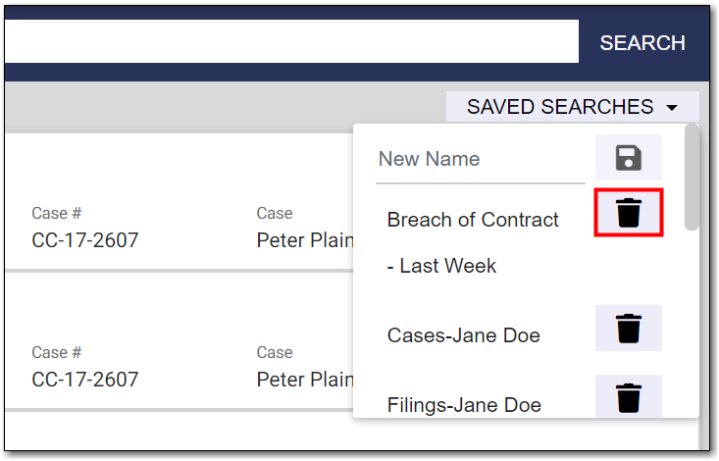


Figure 10.3 – Deleting a Saved Search

Search Alerts

With a subscription, re:Search®NM allows you to create search alerts for cases, filings, and documents. When you create a search alert, re:Search®NM notifies you by email whenever any case, filing, or document that matches your specified search criteria is added to re:Search®NM

The *Search Alerts* page lists all of the search alerts that you have added. You can access the *Search Alerts* page from the re:Search®NM menu ☰).

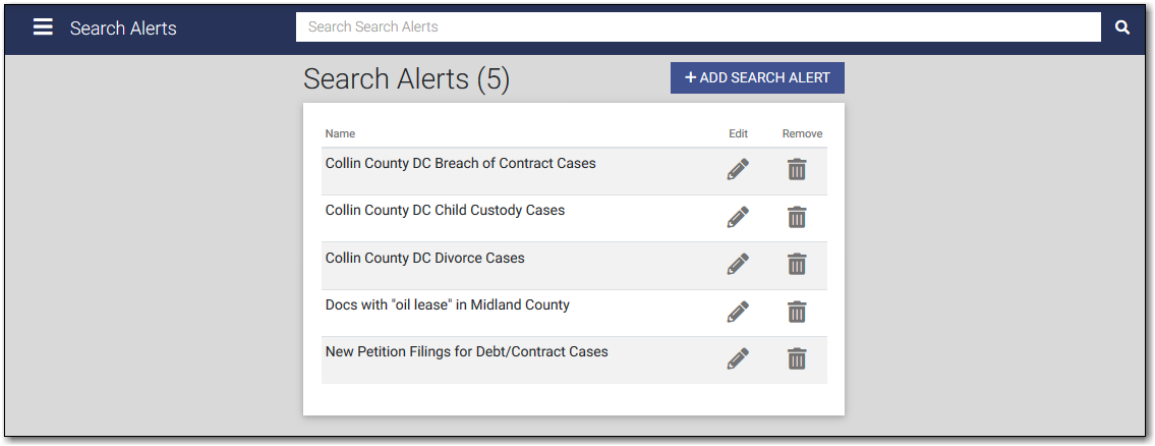


Figure 10.4 – Search Alerts Page

Search Alerts Page Options

The *Search Alerts* page includes the following options.

Option	Description
Search Alerts	To search for a specific search alert, type the full or partial name in the **Search Alerts** field, and then click **Search** or press ENTER. The page refreshes to display matching search alerts. Alternate spellings are included in the search.
Add Search Alert	Click this button to set a new search alert.
✎	Click this icon to view or edit details about the search alert.
🗑	Click this icon to remove a search alert.
First, Previous, 1, 2,..., Next, Last	Use these navigation buttons to browse through your search alerts.

Adding and Editing Search Alerts

You can add a new search alert or edit an existing search alert at any time. To add or edit a search alert:

1. Access the *Search Alerts* page from the re:Search®NM menu ☰).
2. Do one of the following:
    - To add a new search alert, click **Add Search Alert**.

- To edit an existing search alert, click the Edit icon) on the row for the search alert that you want to edit.

The *Add Search Alert* or *Edit Search Alert* page opens.

3. Complete or update the fields.
4. Click **Save**.

Search Alert Fields

Use the *Add/Edit Search Alert* page to specify the search criteria for a search alert.

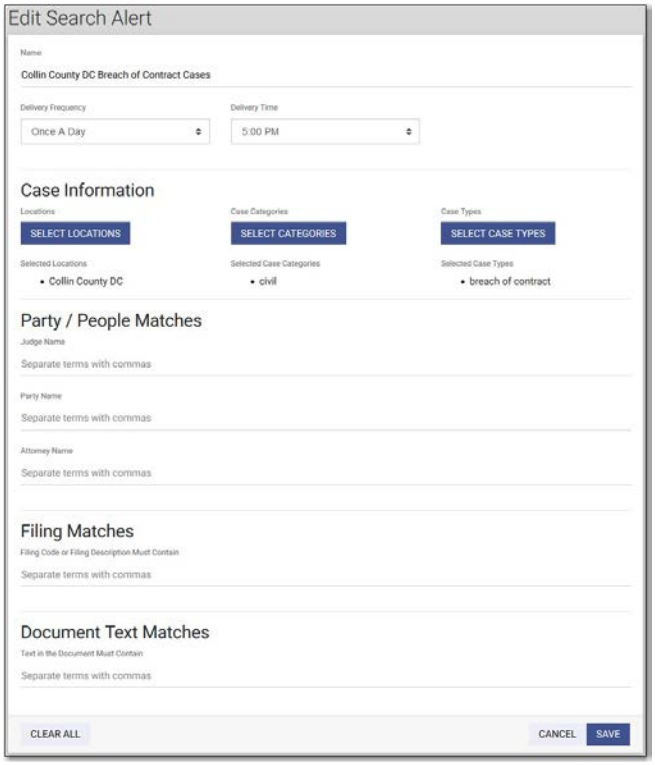


Figure 10.5 – Edit Search Alert Page

Note: Except for the Name field and the Delivery fields, all fields are optional.

The *Add/Edit Search Alert* page includes the following fields.

Area or Field	Description
Name	Type a name for the search alert.
Delivery Frequency	Use the **Delivery Frequency** drop-down list to select when or how often you want to receive notifications. Depending on the frequency that you select, additional fields for the day and time will be displayed. Select one of the following options: • Instantly • Once A Day • Once A Week • Once A Month

Area or Field	Description
Delivery Day Of Week	**Note: This drop-down list is displayed when you select Once A Week from the Delivery Frequency drop-down list.** Select the day of the week that you want to receive notifications.
Delivery Day	**Note: This drop-down list is displayed when you select Once A Month from the Delivery Frequency drop-down list.** Select the day of the month that you want to receive notifications.
Delivery Time	**Note: This drop-down list is displayed when you select Once A Day, Once A Week, or Once A Month from the Delivery Frequency drop-down list.** Select the time of day that you want to receive notifications.
Locations	Click **Select Locations** to select one or more court locations to include in the search criteria. If you do not select any locations, re:Search®NM will consider all locations.
Case Categories	Click **Select Categories** to select one or more case categories to include in the search criteria.
Case Types	Click **Select Case Types** to select one or more case types to include in the search criteria.
Judge Name	If you want to associate the search alert with specific judges, type their names in this field. Separate the names with commas.
Party Name	If you want to associate the search alert with specific parties or participants, type their names in this field. Separate the names with commas.
Attorney Name	If you want to associate the search alert with specific attorneys, type their names in this field. Separate the names with commas.
Filing Matches	Use this field to include filing codes or filing descriptions in the search alert. Separate the filing codes or filing descriptions with commas.

Removing Search Alerts

You can remove a search alert at any time.

1. Access the *Search Alerts* page from the re:Search®NM menu).
2. On the row for the search alert that you want to remove, click the Remove icon).

   A confirmation message opens, asking you to confirm that you want to remove the search alert.
3. Click **Remove**.

The search alert is removed from the *Search Alerts* page.

Case Alerts

With a subscription, re:Search®NM allows you to set an alert on a case. When you set an alert on a case, re:Search®NM sends you an email whenever someone files into the case or whenever a hearing is scheduled for the case. The email includes the case description and number, the location, details about the filing or hearing, and a link to the case.

The Case Alert icon (or) is used as follows to set or remove a case alert and to indicate whether a case alert is currently set:

- The Case Alert icon appears white ( ) when a case alert is not currently set on the case. To set a case alert, click the icon.
- The Case Alert icon appears dark ( ) when a case alert is set on the case. To remove a case alert, click the icon.

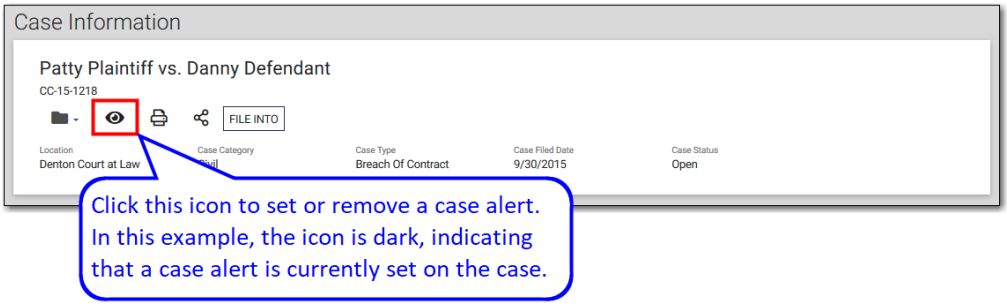


Figure 10.6 – Case Alert Icon on Case Details Page

The Case Alert icon (or) is available on the following pages in re:Search®NM :

- *Case Alerts* page
- *My Cases* page
- *Case Details* page for a case
- *Filing Details* page for a filing

Case Alerts Page

The *Case Alerts* page lists all of the cases on which you have set case alerts. You can access the *Case Alerts* page from the re:Search®NM menu ( ).

Figure 10.7 – Case Alerts Page

Case Alerts Page Details

The *Case Alerts* page displays the following information for each case alert.

Column	Description
Case Description	The case description is the name or title of the case. Click the case description to display the *Case Details* page for the case. **Note: If a case description is not available for any reason, re:Search®NM uses the case number for the case description.**
Case Number	The case number is the number assigned to the case by the court.
Case Type	The case type is the type of case within the case category.
Location	The location is the court to which the case is assigned.
Remove Alert	A dark Case Alert icon) is displayed for each case.

Case Alerts Page Options

The *Case Alerts* page includes the following options.

Option	Description
View Case Details	Click any case description to open the *Case Details* page for that case.
Search Case Alerts	To search for a specific case, enter search criteria in the **Search Case Alerts** field, and then click **Search**.
Remove Case Alerts	Click the dark Case Alert icon) to remove the case alert. The icon changes to a white Case Alert icon) to indicate that you removed the case alert. To give you time to set the case alert again in case you clicked the icon by mistake, the case remains displayed on the *Case Alerts* page until you refresh or leave the page.
First, Previous, 1, 2,...,Next, Last	Use the navigation buttons to browse through your case alerts.

Setting a Case Alert

If you would like re:Search®NM to notify you by email whenever someone files into a particular case, you can set a case alert on that case.

You can use one of the following methods to set a case alert.

Option	Steps
To use the *Case Details* page to set a case alert:	1. Access the *Case Details* page for the case. 2. In the **Case Information** section, click the white Case Alert icon).
To use the *Filing Details* page to set a case alert:	1. Access the *Filing Details* page for any filing attached to the case. 2. In the **Case Information** section, click the white Case Alert icon).

To use the *My Cases* page to set a case alert: **Note: The *My Cases* page is available only to non-firm users.**	1. Access the *My Cases* page from the re:Search®NM menu ☰). 2. Locate the case. 3. In the **Case Alerts** column, click the white Case Alert icon 👁).

The icon changes to a dark Case Alert icon 👁) to indicate that you set a case alert on the case.

Removing a Case Alert

You can remove a case alert from a case at any time using one of the following methods:

Option	Steps
To use the *Case Alerts* page to remove a case alert:	1. Access the *Case Alerts* page from the re:Search®NM menu ☰). 2. Locate the case. 3. In the **Remove Alert** column, click the dark Case Alert icon 👁). The icon changes to a white Case Alert icon 👁)
To use the *Case Details* page to remove a case alert:	1. Access the *Case Details* page for the case. 2. In the **Case Information** section, click the dark Case Alert icon 👁). The icon changes to a white Case Alert icon 👁)
To use the *Filing Details* page to remove a case alert:	1. Access the *Filing Details* page for any filing attached to the case. 2. In the **Case Information** section, click the dark Case Alert icon 👁). The icon changes to a white Case Alert icon 👁)
To use the *My Cases* page to remove a case alert:	1. Access the *My Cases* page from the re:Search®NM menu ☰). 2. Locate the case. 3. In the **Case Alerts** column, click the dark Case Alert icon 👁). The icon changes to a white Case Alert icon 👁)

Name Alerts

With a subscription, re:Search®NM allows you to set an alert on the name of a party, attorney, or judicial officer.

When you set a name alert, re:Search®NM notifies you by email whenever the name is added to a case. The email includes the case description and number and a link to the case.

The *Name Alerts* page lists all of the names on which you have set an alert. You can access the *Name Alerts* page from the re:Search®NM menu).

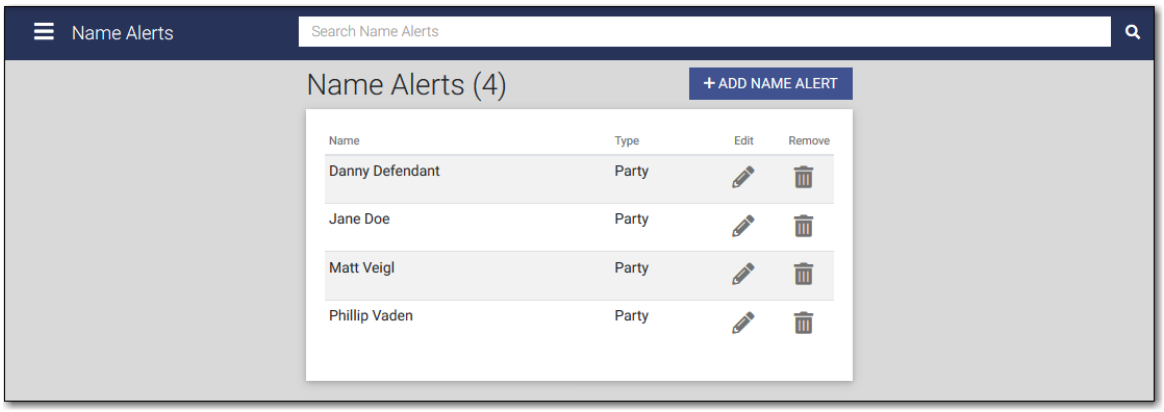


Figure 10.8 – Name Alerts Page

The *Name Alerts* page includes the following options.

Option	Description
Search Name Alerts	To search for a specific name, type a full or partial name in the **Search Name Alerts** field, and then click **Search** or press ENTER. The page refreshes to display matching names. Alternate spellings are included in the search.
Add Name Alert	Click this button to open the *Name Alert* dialog box to set a new name alert.
	Click this icon to view or edit details about the name alert, including any alternatespellings.
	Click this icon to remove a name alert.
First, Previous, 1, 2,..., Next, Last	re:Search®NM can display up to 10 name alerts at a time. If you have created more than 10 name alerts, these navigation buttons are displayed to help you browse through your name alerts.

Adding a Name Alert

If you would like re:Search®NM to notify you by email whenever someone adds a specific party, attorney, or judicial officer to a case, you can create an alert for the name. The name can be a person's name or the name of a business or law firm.

Use one of the following options to add a new name alert:

Option	Steps
To add a name alert from the *Name Alerts* page:	1. Access the *Name Alerts* page from the re:Search®NM menu ☰). 2. Click **Add Name Alert**. The *Name Alert* dialog box opens. 3. Complete the fields. 4. Click **Save**.
To add a name alert from the *Case Details* page for a case:	1. Access the *Case Details* page for the case. 2. Click the name of the party, attorney, or judicial officer to open the Name Options menu, and then click **Name Alert**. The *Name Alert* dialog box opens with the name of the party, attorney, or judicial officer already displayed in the **Name** field and the appropriate type selected in the **Type** drop-down list. 3. Complete the fields. 4. Click **Save**.
To add a name alert from the *Filing Details* page for a filing: **Note: This option works only if you are adding a name alert for a judicial officer.**	1. Access the *Filing Details* page for the case. 2. Click the name of the judicial officer to open the Name Options menu, and then click **Name Alert**. The *Name Alert* dialog box opens with the name of the judicial officer already displayed in the **Name** field and the value **Judge** selected in the **Type** drop-down list. 3. Complete the fields. 4. Click **Save**.

Name Alert Fields

Use the *Name Alert* dialog box to add or edit a name alert.

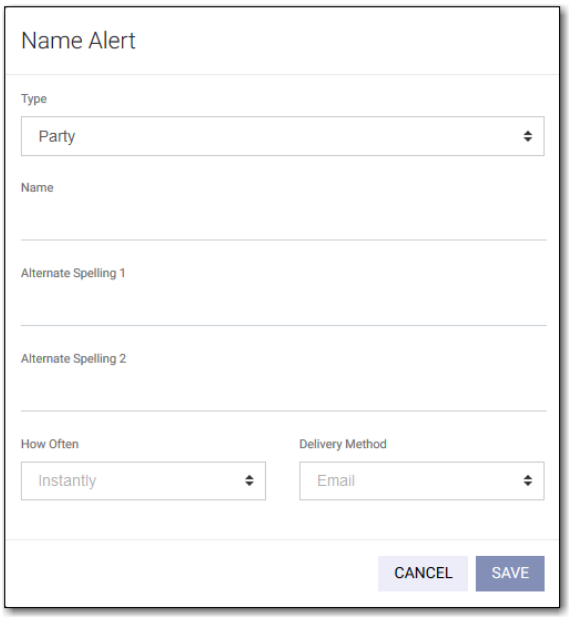


Figure 10.9 – Name Alert Dialog Box

The *Name Alert* dialog box includes the following fields.

Field	Description
Type	Select whether you are setting a name alert for a party, an attorney, or a judge.
Name	Type the name of the party, attorney, or judicial officer. If you selected the name from the *Case Details* page, the name is already displayed. The name can be a person's name or the name of a business or law firm.
Alternate Spelling 1/ Alternate Spelling 2	Use these fields to enter alternate spellings or known misspellings of the name entered in the **Name** field. These fields are optional.
How Often	This field indicates when or how often notifications are sent. Currently, the only option for this field is **Instantly**.
Delivery Method	This field indicates how notifications are sent. Currently, only email notifications are supported.

Editing a Name Alert

You can edit details about an existing name alert at any time.

To edit details for a name alert:

1. Access the *Name Alerts* page from the re:Search®NM menu).
2. On the row for the name alert that you want to edit, click the Edit icon).

Figure 10.10 – Edit Icon on Name Alerts Page

The *Name Alert* dialog box opens.

3. Update the fields as required.
4. Click **Save**.

Your changes to the name alert are saved.

The *Name Alert* dialog box includes the following fields.

Field	Description
Type	Select whether you are setting a name alert for a party, an attorney, or a judge.
Name	Type the name of the party, attorney, or judicial officer. If you selected the name from the *Case Details* page, the name is already displayed. The name can be a person's name or the name of a business or law firm.
Alternate Spelling 1/ Alternate Spelling 2	Use these fields to enter alternate spellings or known misspellings of the name entered in the **Name** field. These fields are optional.
How Often	This field indicates when or how often notifications are sent. Currently, the only option for this field is **Instantly**.
Delivery Method	This field indicates how notifications are sent. Currently, only email notifications are supported.

Removing a Name Alert

You can remove a name alert at any time.

To remove a name alert:

1. Access the *Name Alerts* page from the re:Search®NM menu).
2. On the row for the name alert that you want to remove, click the Remove icon).

Figure 10.11 – Remove Icon on Name Alerts Page

A confirmation message opens, asking you to confirm that you want to remove the name alert.

3. Click **Remove**.

The name alert is removed from the *Name Alerts* page.

My Folders

You can create personalized folders to help organize your cases and provide quick access to those cases.

Folders are arranged in alphabetical order on the **My Folders** card on the *Dashboard*.

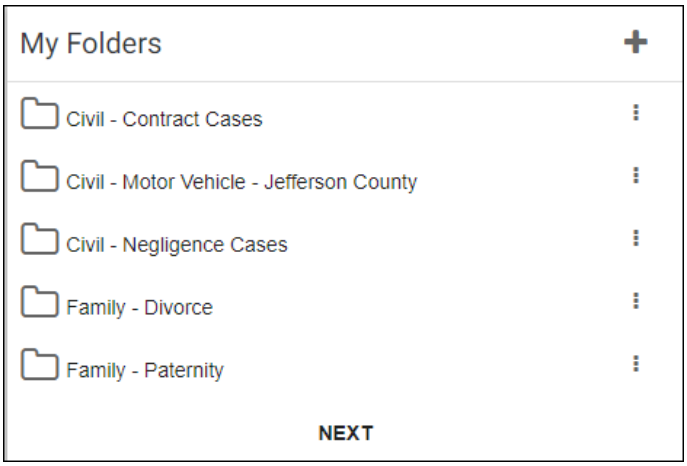


Figure 10.12 – My Folders Card

The following options are available on the **My Folders** card.

Option	Description
+	Click the Add icon to add a new folder.
⋮	Click the More Options menu to edit or delete a folder.
Folder Name	Click the folder name to open a folder.
Previous / Next	Click these buttons to move through your folders. These buttons are displayed only if the list of folders is more than one page long.

Adding a Folder

Folders can be added directly from the **My Folders** card on the *Dashboard*.

Note: You can also create a new folder from the *Case Detail* page or the *Filing Detail* page. Refer to the "Adding Cases to Folders" for more information.

To add a folder from the **My Folders** card:

1. Click +.
2. Type a name for the folder in the **New Folder Name** field.
3. Click , or press ENTER.

The new folder is now displayed on the **My Folders** card.

Renaming a Folder

You can rename a folder on the **My Folders** card on the *Dashboard*.

To rename a folder:

1. On the **My Folders** card, locate the folder that you want to rename.
2. Click ⋮, and then click **Edit**.
3. Change or overwrite the folder name.
4. Click ☑, or press ENTER.

The folder is displayed with the new name on the **My Folders** card.

Deleting a Folder

If you no longer need a folder, you can easily delete it.

To delete a folder:

1. On the **My Folders** card, locate the folder that you want to delete.
2. Click ⋮, and then click **Delete**.

   A message is displayed, asking you to confirm that you really want to delete the folder.
3. Click **Delete**.

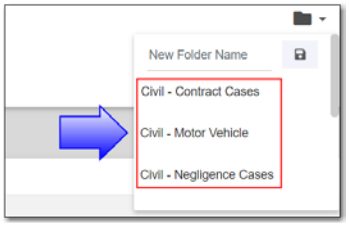
The folder is removed from the **My Folders** card.

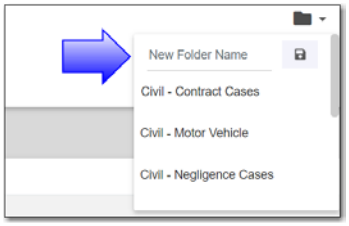
Adding Cases to Folders

You can add cases to folders in the **Case Information** section on the *Case Details* page or the *Filing Details* page.

To add a case to a folder:

1. Access the *Case Details* page for the case, or access the *Filing Details* page for one of the filings for the case.
2. Do one of the following:

Option	Description
To save the case to an existing folder:	a. In the **Case Information** section, click **Save to Folder**. b. Select an existing folder from the list of folders. 

Option	Description
To create a new folder and save the case to the new folder:	a. In the **Case Information** section, click **Save to Folder**. **b.** Type the folder name in the **New Folder Name** field.  c. Either click , or press ENTER.

The case is now saved in the folder you selected or created, and the **Save to Folder** button is replaced with the name of the folder.

Removing Cases from Folders

You can remove a case from a folder using either the folder itself or the **Case Information** section on the *Case Details* page or the *Filing Details* page.

To remove a case from a folder:

1. Choose one of the following options to remove a case from a folder:

Option	Description
To remove a case from a folder by using the folder itself:	a. On the **My Folders** card, click the folder containing the case. b. Click next to the case that you want to remove. 
To remove a case from a folder by using the Case Information section on the *Case Details* page or the *Filing Details* page:	a. Access the *Case Details* page for the case, or access the *Filing Details* page for one of the filings for the case. b. In the **Case Information** section, click the folders menu (which currently shows the name of the folder in which the case is saved), and then click **Remove from folder**. 

The case is removed from the folder.

Text In Document Searching

On the *Basic Search* page, you can search for text within documents by entering keywords in the **Search** field. You can also select filter options to narrow the search results.

To search for text in documents:

1. Access the *Basic Search* page either by clicking the search) icon in the **Quick Search** card on the *Dashboard* or by clicking **Search** on the re:Search menu).
2. Selct the **Text in Documents** radio button on the left side.
3. Type your search criteria in the **Search** field, and then press ENTER or click the Search icon).
4. Any document you have rights to view with your search criteria in it will display in the search results.
5. Apply the Location, date range, and other filters to drill down.

   Note: The Search field supports Boolean searches, which can be useful when you are trying to narrow down your search results. Click the Search Help icon ?) to display descriptions of the available Boolean search operators.

   If re:Search finds any matches, it displays them in the search results area. For each match, re:Search displays the filing details, the document, the matching text (highlighted in yellow), and the surrounding text to give it some context. Note that re:Search will show only the first five matches within a document.

11 My Account

Topics covered in this chapter

This chapter describes the *My Account* page and provides instructions for maintaining your account.

Note: Procedures for managing your password are provided in the "Getting Started" chapter.

My Account Page

Use the *My Account* page to manage your account, subscriptions, and payment methods. The options available on the *My Account* page vary by user role and location.

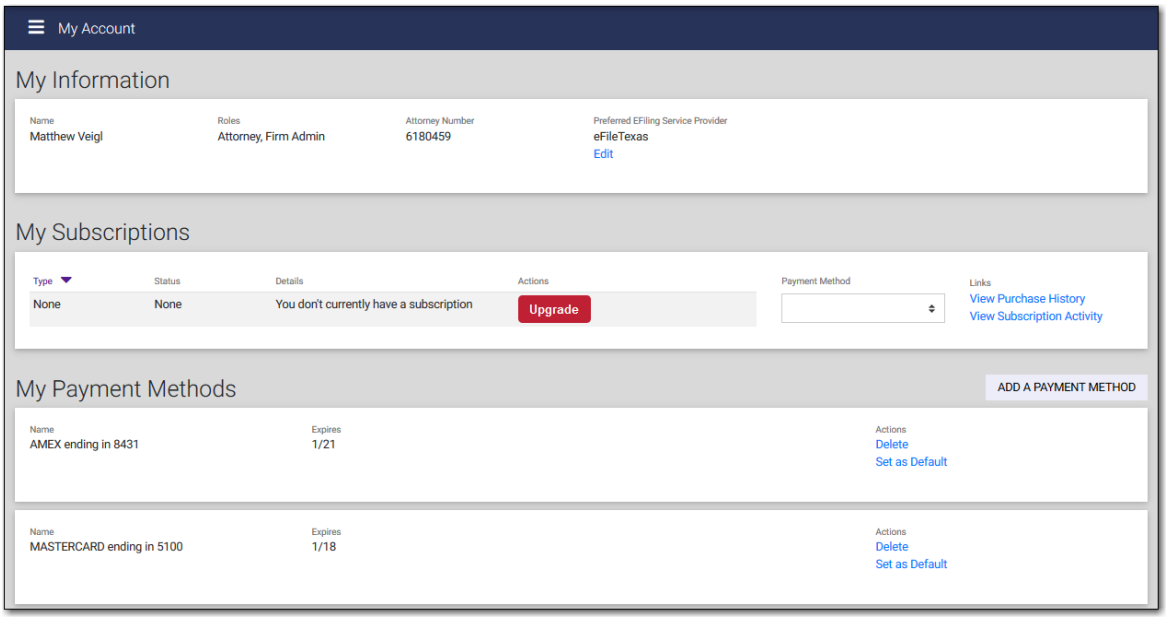


Figure 11.1 – My Account Page

To open the *My Account* page, select **My Account** from the re:Search®NM menu).

My Information Section

The **My Information** section on the *My Account* page provides basic information about you and identifies your e-filing service provider.

Field	Description
Name	This field identifies the email address associated with your account.
Roles	This field lists your assigned user roles. Your roles determine which tasks you can perform and the type of information you can modify or view.
Attorney Number	If you are an attorney, this field displays your New Mexico Supreme Court CAID number.
Link Attorney Number	If your account is not linked to an attorney number, this field is displayed in place of the **Attorney Number** field. If you wish to link your account to your attorney number, click the **Link** button, and follow the prompts to complete the attorney onboarding process. **Note: If you are an attorney and your account is not linked to your attorney number, you will not have attorney privileges in re:Search®NM.**

My Subscriptions Section

The **My Subscriptions** section on the *My Account* page lets you view the status of your subscriptions and renewal dates, and perform basic functions associated with your subscriptions.

Field or Button	Description
Type	When applicable, this field displays the type of subscription.
Status	This field displays the status of the subscription.
Details	This field displays the renewal date for your subscription or points out that you do not have a subscription.
Payment Method	This field identifies the payment method used to pay for your subscription. If you have more than one payment method for your account, you can select a different payment method from the drop-down list.
Disable Auto-Renew	Click this button to turn off auto-renew for the subscription. This is also how you cancel a subscription.
Enable Auto-Renew	Click this button to turn on auto-renew for the subscription. Once enabled, the subscription will be renewed automatically at the end of the current billing period.
Upgrade	Click this button to open the *Pricing* page and learn more about re:Search®NM subscriptions. **Note: This button is not displayed if you are already a subscriber.**
Change Subscription	Click this button to open the *Pricing* page to change your subscription. **Note: This button is displayed if you are already a subscriber.**
View Subscription Activity	Click this link to open the *My Subscription Activity* page.

My Payment Methods Section

The **My Payment Methods** section on the *My Account* page is where you maintain payment methods.

Field, Button, or Message	Description
Add a Payment Method	Click this button to add a new payment method.
Name	This field identifies the type of credit or debit card used for the payment method and the last four digits on the card. The indicator **(Default)** is displayed next to the default payment method. In the list of payment methods, the default payment method is always listed first. If you are an attorney, and the payment method is managed through your File & Serve™ or File & Serve™ firm account, that information is shown in parentheses. Example: `AMEX ending in 0005 (File & Serve Firm Account)`
Expires	This field displays the expiration date on the credit card or debit card.
Delete	Click this button to delete a payment method.
Set as Default	Click this button to set a new default payment method.
File & Serve Payment Method, manage in File & Serve	This message is displayed if the payment method is managed through your File & Serve or File & Serve account.

Start a Subscription Trial

Use the *Upgrade* button to buy a subscription. After choosing the subscription level you want, a 14-day free trial period will begin.

My Subscription Activity Page

Use the *My Subscription Activity* page to view your subscription activity.

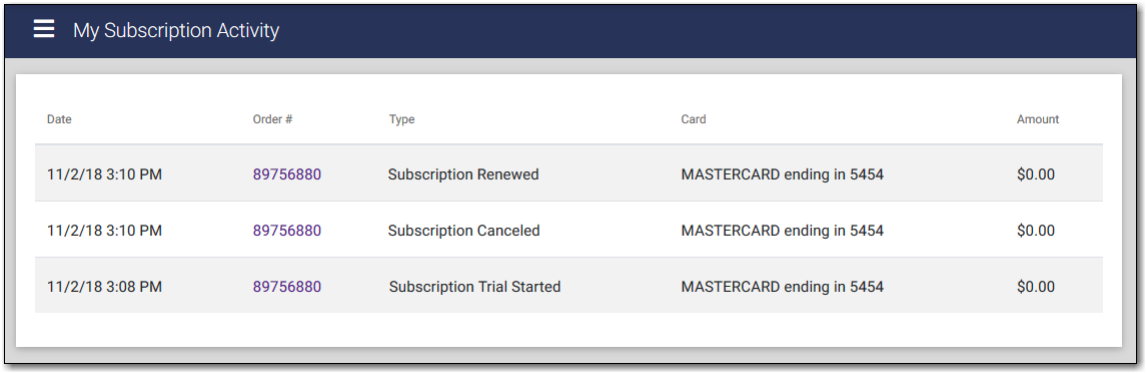


Figure 11.2 – My Subscription Activity Page

The following information is displayed for each activity.

Column	Description
Date	This column displays the date and time of the activity.
Order #	This column displays the order number. Click the order number to display your receipt for the order.
Type	This column displays the activity type. The following activity types are possible for subscriptions: • Subscription Trial Started • Subscription Canceled • Subscription Renewed • Subscription Expired
Card	This column displays the type of credit/debit card and the last four digits of the card number used to purchase the subscription.
Amount	This column displays the amount you paid for the subscription.

Renewing Your Subscription

You can renew an expired or canceled subscription at any time by enabling auto-renew. When you enable auto-renew, the subscription will be reactivated immediately and will be renewed automatically at the end of each billing period.

To renew a subscription:

1. Click , and then click **My Account**.

   The *My Account* page is displayed.

2. In the **My Subscriptions** section, click **Enable Auto-Renew** for the subscription that you want to renew.

   A confirmation message is displayed.

3. Click **Enable Auto-Renew** to finish renewing your subscription.

   re:Search®NM sends you an email confirming that you renewed your subscription or that it will be renewed at the end of the current billing period.

Canceling Your Subscription

You can cancel a subscription at any time, but the cancellation will not go into effect until the end of your current billing period.

To cancel a subscription:

1. Click , and then click **My Account**. The *My Account* page is displayed.
2. In the **My Subscriptions** section, click **Disable Auto-Renew** for the subscription that you want to cancel.
   A message is displayed, asking why you are disabling auto-renew for your subscription. The message displays a list of common reasons.
3. Select your reason from the list, or select **Other** and then type your own reason in the space provided.
4. Click **Disable Auto-Renew**.
   re:Search®NM sends you an email confirming that your subscription will be canceled at the end of the current billing period.

Adding a Payment Method

To purchase documents, you must add at least one payment method. Adding a payment method means registering a credit card or debit card. If you need to use more than one credit card or debit card, you can add a separate payment method for each card.

To add a payment method:

1. Click , and then click **My Account**. The *My Account* page is displayed.
2. In the **My Payment Methods** section, click **Add a Payment Method**.

   The *Add Payment Method* dialog box is displayed.
3. Complete the fields.
4. Click **Continue**.

   A summary of your billing information is displayed for you to verify.
5. Click **Save Information**.

The new payment method is added to the **My Payment Methods** section.

Deleting a Payment Method

You can delete a payment method at any time. To delete a payment method:

1. Click , and then click **My Account**. The *My Account* page is displayed.
2. In the **My Payment Methods** section, identify which payment method that you want to delete, and then,

   under the **Actions** heading on that row, click **Delete**.

   A confirmation message is displayed, asking you to confirm that you really want to delete the payment method.
3. Click **Delete**.

The payment method is deleted from the **My Payment Methods** section.

Setting the Default Payment Method

When you use two or more payment methods, one is always designated as the default payment method. Otherwise, you would have to select the payment method every time you make a purchase. You can easily change which payment method to use as the default payment method.

To set the default payment method:

1. Click , and then click **My Account**.

   The *My Account* page is displayed.
2. In the **My Payment Methods** section, identify which payment method that you want to set as the default payment method, and then, under the **Actions** heading on that row, click **Set as Default**.

The new default payment method is moved to the top of the list of payment methods, and the indicator **(Default)** is displayed next to the payment method name.

12 Purchases

Topics covered in this chapter

You can view, filter, and export your purchase history on the *Purchases* page. If you are a firm user, you can also view purchases made by other members of your firm.

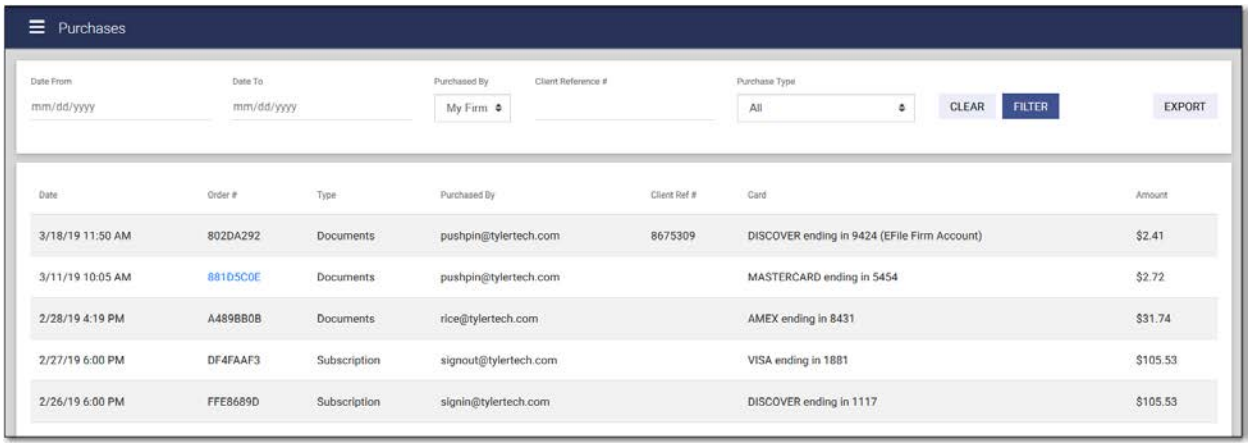


Figure 12.1 – Purchases Page

Purchases are listed in chronological order by purchase date (the newest purchases are listed first).

Viewing the Purchase History

Use the *Purchases* page to review your purchase history or your firm's purchase history.

To view the *Purchases* page:

1. Click the re:Search®NM menu ☰).
2. Click **Purchases**.

The *Purchases* page opens.

Purchases Page Details

The *Purchases* page displays purchase details in columns.

Column	Description
Date	This column displays the date and time that you made the purchase.
Order #	This column displays the order number. Click the order number to display details about the order. If the order is for documents, clicking the order number displays the *Order Details* page for the order. If the order is for a subscription or subscription cancellation, clicking the order number displays the receipt.

Column	Description
Type	This column displays the purchase type. re:Search®NM supports the following purchase types: • Subscription • Subscription Cancellation **Note: If your site does not support document purchases, the Subscription type is the only available purchase type.**
Purchased By	This column displays the email address of the user who made the purchase.
Card	This column displays the type of credit/debit card and the last four digits of the card number used to make the purchase.
Amount	This column displays the amount you paid for the order.

Purchases Page Options

The *Purchases* page provides the following options.

Option	Description
Filter Options	Use the filter options at the top of the *Purchases* page to narrow the list of purchases to specific dates, client reference numbers, or purchase types. Click **Filter** to apply the filter options that you selected. Click **Clear** to remove or reset the filter options that you selected.
Export	Click this button to export the purchase history (with or without filtering) to a Microsoft® Excel® spreadsheet.
First, Previous, 1, 2,..., Next, Last	Use these navigation buttons to browse through your purchases.

Filtering the Purchase History

You can filter the purchases listed on the *Purchases* page to display purchases made on or between certain dates or with specific client reference numbers or purchase types.

To filter your purchase history:

1. Click **Purchases** on the re:Search®NM menu

). The *Purchases* page opens.
2. Complete the **Date From**, **Date To**, **Purchased By**, **Client Reference #**, or **Purchase Type** fields, as applicable.
3. Click **Filter**.

Purchase History Filter Options

The *Purchases* page provides the following filter options, which you can apply in any combination.

Option	Description
Date From	Click this field to select a start date.
Date To	Click this field to select an end date. If you do not select an end date, the end date is the current date.

Option	Description
Purchased By	Use the **Purchased By** drop-down list to filter the purchase history by who made the purchase. You can select one of the following options: • **Me**—Select this option to display only your purchases. If you are not a firm user, this is the only option.
Purchase Type	Use the **Purchase Type** drop-down list to filter your purchase history by purchase type. You can select one of the following options: • Subscription **Note: If your site does not support document purchases, the Subscription type is the only available purchase type.**
Clear	Click this button to clear the filter criteria.
Filter	Click this button to apply the filter criteria.

Exporting the Purchase History

You can export the purchases listed on the *Purchases* page to a comma-separated values (CSV) file, which you can then open in a spreadsheet application.

Prerequisite: Your browser must be set up to allow pop-up windows.

To export the purchase history:

1. Access the *Purchases* page by clicking **Purchases** on the re:Search®NM menu).
2. If necessary, apply filters to narrow the list of purchases.
3. Click **Export**.

   re:Search®NM exports the purchase history to a CSV file. Depending on your browser, you are then prompted to save the file or open it in a spreadsheet application.
4. Respond to your browser's prompt to view or save the file.