

Administrative Office of the Courts

Supreme Court of New Mexico

Arthur W. Pepin, Director



237 Don Gaspar, Room 25
Santa Fe, NM 87501
(505) 827-4800
(505) 827-4824 (fax)

Judicial Information Division (JID)

Managing Party Data
Standard Operating Procedure
Version 1.0
Updated: (10/2018)

Title of Procedure

COURT / DEPARTMENT / DIVISION

This procedure is used by all courts.

USER

This is for all users who enter party data.

PURPOSE

The purpose of this procedure is to provide clear instructions regarding the entry of party data at both the global party level and the case party level. This procedure is not for the purpose of creating and adding parties to cases.

It should be noted that while the global party record and the case party record are related, they are **not** the same. They are separate records in Odyssey, and it is crucial that users are careful to work with the appropriate record when adding or updating party information.

The “Modify Party” screen represents the global party record that is shared by all courts/users in Odyssey. The “Modify Case Party Details” screen is the case party record and represents the party’s information that is associated to a specific case in a specific court.

All information should appear on the “Modify Party” window on the global party record so it can be shared by all courts. Specific information for a case should be pinned, i.e., locked, to the case on the “Modify Case Party Details” window.

NAVIGATION

Start from the Parties Tab of a case.

NUMBERED STEPS

The following sections will explain --

- General Policy Guidelines
- Adding Alias Names to Parties
- Changing the Party Name
- Adding Addresses to Parties
- Restricting a Party on a Case
- Adding Personal Identifiers to Parties
- Adding an Interpreter Requirement to Parties

GENERAL POLICY GUIDELINES

1. It should be noted that all names should appear in proper case. That is to say, names should appear in upper and lower case, e.g., Paul Gerald Martinez, **not** in all upper case, as in PAUL GERALD MARTINEZ. Names that are in all caps should only represent

names that were converted into Odyssey from legacy systems. All new names entered into Odyssey should be in upper and lower case.

2. All addresses should also appear in upper and lower case for street names, town names, business or building names, etc. For example: Western Bank, 231 Maple Avenue, Roswell, NM 88201, **not** WESTERN BANK, 231 MAPLE AVENUE, ROSWELL, NM 88201.
3. Court staff DO NOT have rights to edit existing party names once they have been saved. They can only add new names. The reason for this is because global party records are shared by all courts, and it may or may not be appropriate to edit a name that may exist on other cases in other courts. Names that need corrections due to typos, or switching a first and last name, etc., must be submitted to the Help Desk for correction and cleanup.
4. When a DOB, SSN or DL number has been incorrectly added, the user may have the rights to delete the incorrect data. (That does not apply to names.) If the user does not have the rights, a supervisor may be able to fix the mistake, or it can be submitted to the Help Desk for cleanup. Do **not** leave DOBs, SSNs, or DLs on a party record when you know they are wrong. That associates false data to a party, and is not appropriate.
5. All party data, e.g., names, personal identifiers, addresses, etc., should be appear on the global party record, so the information is accessible to all courts. The appropriate data elements should be pinned to the party's individual cases.

ADDING ALIAS NAMES TO PARTIES

1. Go to the Parties Tab of the case.

M-61-TR-2018-00544

Forms Save/Copy Save Exit

Summary Detail **Parties** Charges Events Service Hearings Conditions Notes Disposition Time Stds Financial

State of New Mexico v. PAUL G MARTINEZ, JR
Type Traffic

Group By **Connection Type** Show All Connections
 Related Parties View

Party & Attorney Information Add Party Add Attorney Add Group/Associate

Defendant	MARTINEZ, PAUL G. Jr. DOB: 12/22/1976 Age: 41Y 10M
Plaintiff	State of New Mexico

Participant & Attorney Information

Officer	Wanya, Gerald, Ofc
---------	------------------------------------

2. Click on the name of the party that has the alias. This will bring up the Modify Case Party Details dialog box. To add an alias name to this party, click on the + above and to the right of the party's name.

Modify Case Party Details

Name
MARTINEZ, PAUL G, Jr.

Style

Do Not Send Notice
 Always Send Notice
 Display as Restricted Party in Public

Address

Party Correspondence Address
10 Camino Corto LN
Placitas, NM 87043

Case Correspondence Address
10 Camino Corto LN
Placitas, NM 87043

Additional

Birth Date
12/22/1976

Social Security
585-69-4977

Driver's License
NM 100881446

Attorney

Type Defendant
Added 10/01/2018

Continue **Exit**

3. That will open the Select Names screen.

Select Names

Primary	Name on Case	Type
<input type="checkbox"/>	MARTINEZ, PAUL	
<input type="checkbox"/>	MARTINEZ, PAUL, Jr.	
<input checked="" type="checkbox"/>	MARTINEZ, PAUL G, Jr.	
<input type="checkbox"/>	MARTINEZ, PAUL G	

New Name **Continue** **Exit**

4. This displays all of the names that have been associated to this party record. If the name you want does not display here, click on the “New Name” button at the bottom of the screen.

5. That will open the Add Name window.

Add Name

Standard Nickname Business

Title

First Paul

Middle Gerald

Last Martinez

Suffix

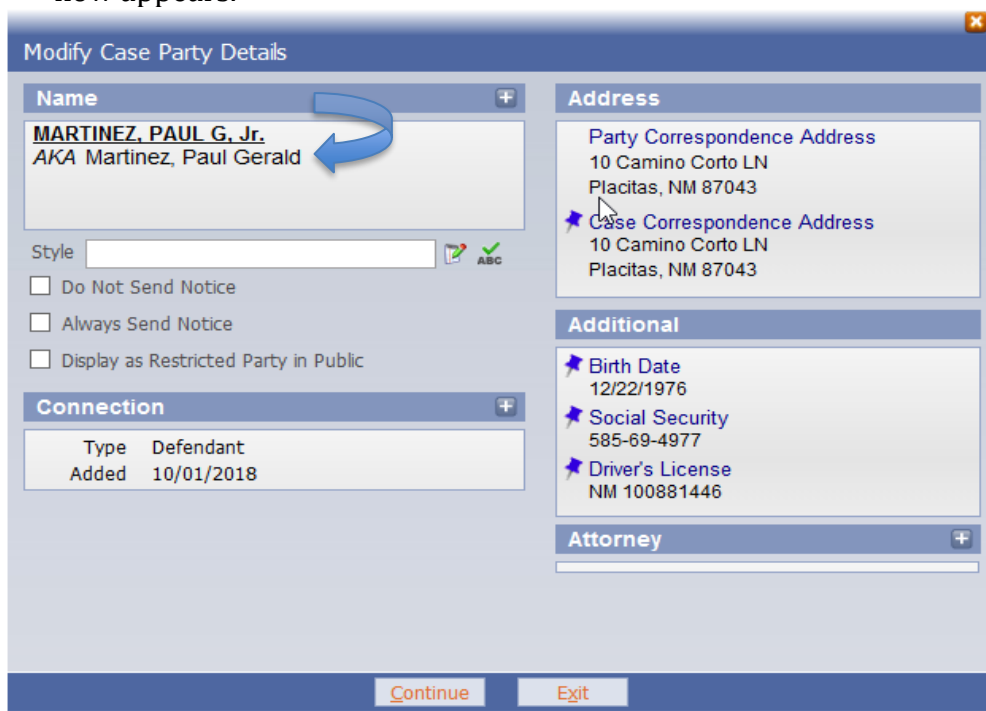
Current Known Name

Continue **Exit**

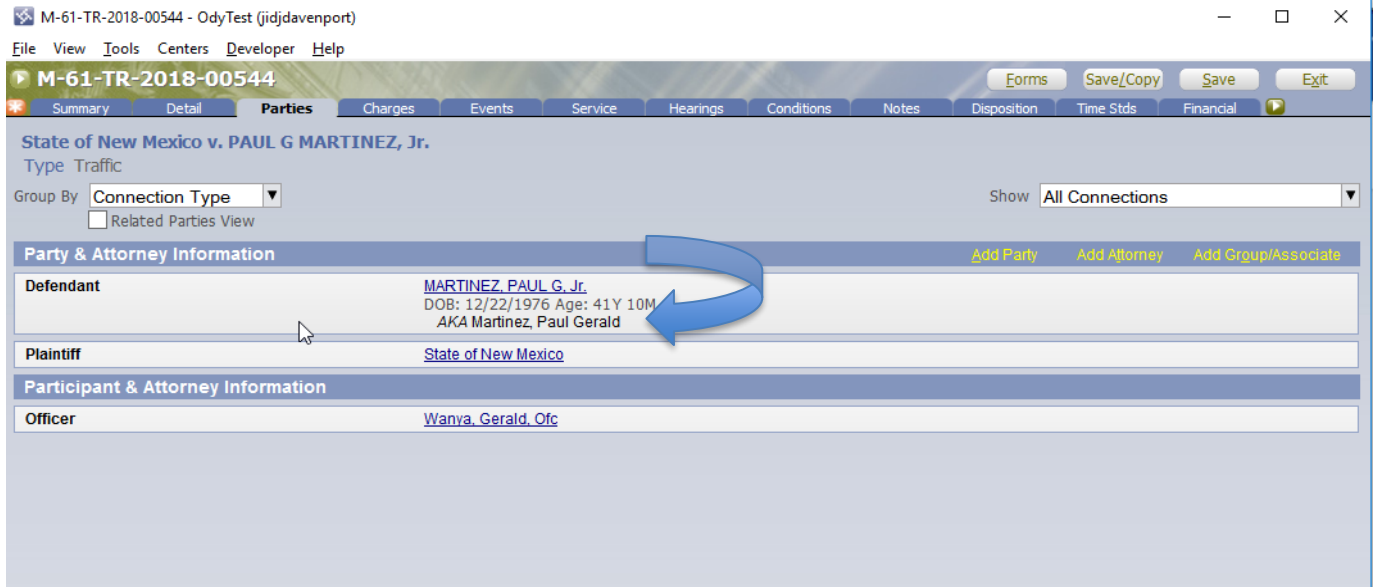
- The radio buttons at the top allow the user to select a standard name (First, Middle, Last, and Suffix name fields), or a nickname (one field called Nickname), or a business name (one field called Business). Select the appropriate one and type in the name.
- Click the Continue button to return to the Select Names screen. The new name that was just created will now appear among the list of names, and be added to the global party.



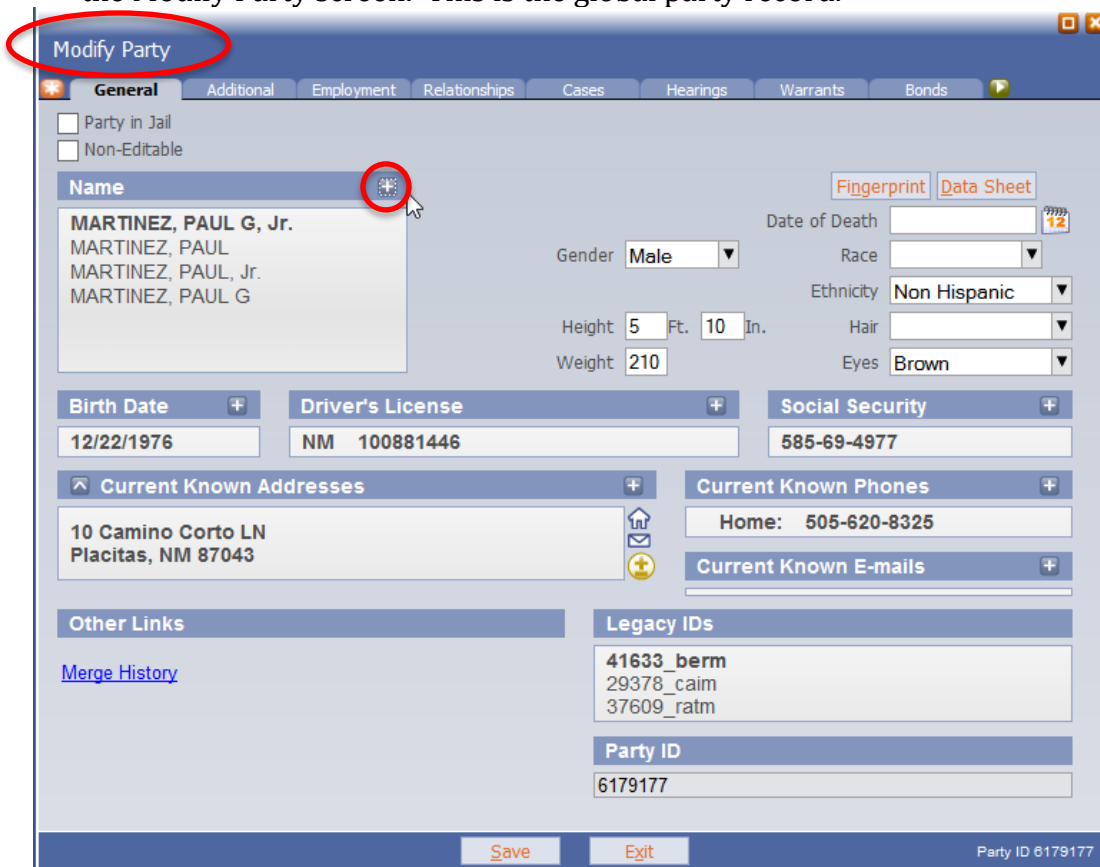
- Clicking in the box in front of a name it will add the name to the case. It will also enable the drop down box to select the type of alias name for the case. Those types are: AKA=Also Known As; DBA=Doing Business As; FDBA=Formerly Doing Business As; FKA=Formerly Known As; NKA=Now Known As; and OBO=On Behalf Of.
- Once all names for the case have been selected and their alias type chosen, click on the Continue button to return to the Modify Case Party Details screen, where the alias name now appears.



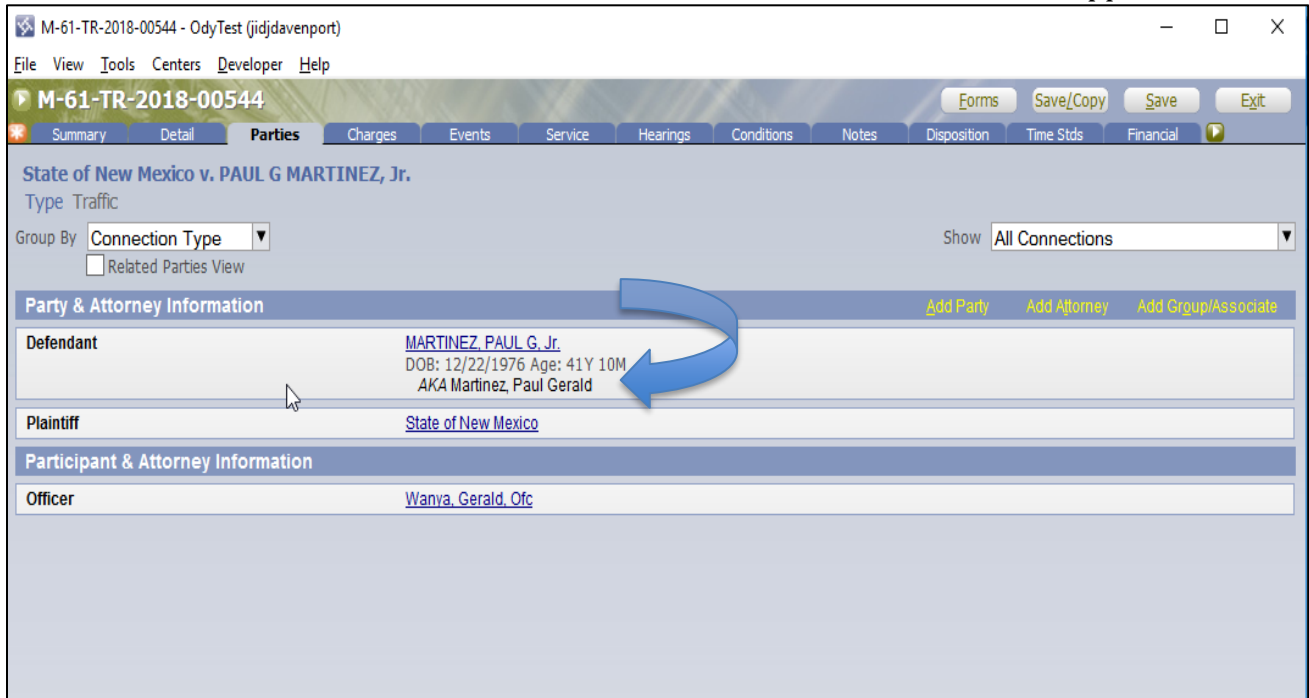
10. Click on the Continue button to return to the Parties Tab, where the alias name will also now display.



11. The alias name may also be added directly to the global party record from the Modify Party screen. From the Parties Tab, click on the name that needs the alias to open up the Modify Case Party Details screen. Then click on the name again to open up the Modify Party screen. This is the global party record.



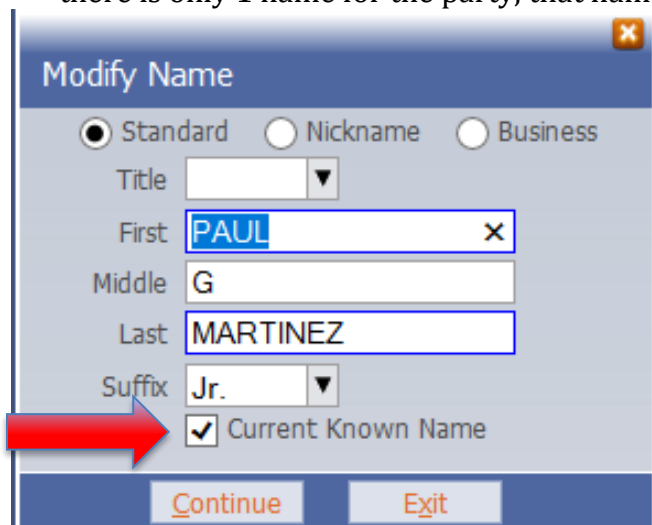
- To add a new name, click on the + and follow the same process in steps #5 & #6 above. Click the Continue button to return to the Modify Party screen. Then hit the Save button to return to the Modify Case Party Details screen.
- Now you need to add the new alias name to the case. From the Modify Case Party Details screen, hit the + to open the Select Names screen and follow the process in steps #7 – #9.
- Click the Continue button to return to the Parties Tab, where the new alias appears.



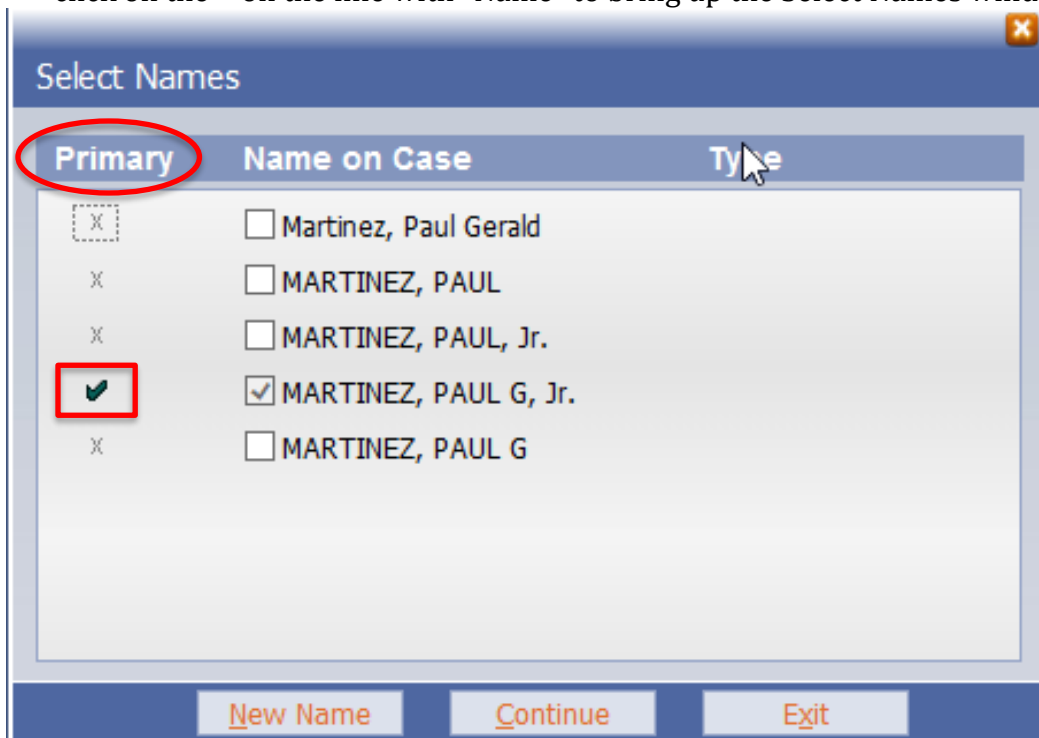
- Save the case.

CHANGING THE PARTY NAME

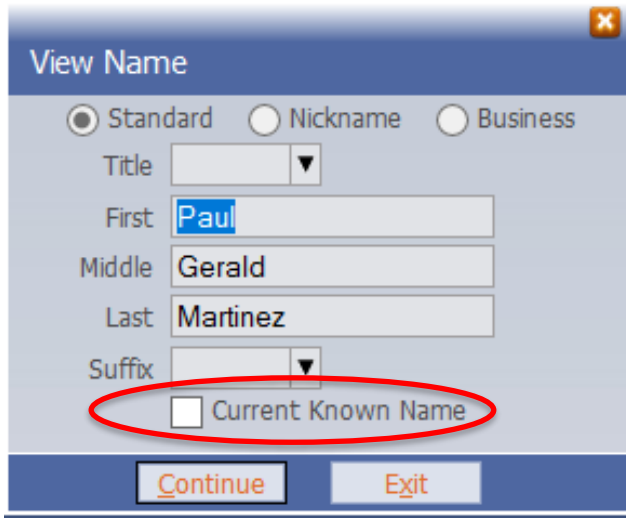
- Each Party record has one name that is identified as the “Current Known Name”. If there is only 1 name for the party, that name will default as the Current Known Name.



2. Each Case Party has a name that is identified as the “Primary Name” on the case.
3. The Current Known Name and the Primary Name may be the same, or they may be different.
4. When a party is added to a case, it will be added with the name that Odyssey identifies as the Current Known Name, and will default that name as the Primary Name. But that isn’t always the name that gets filed. For example, the party record may have a Current Known Name having a middle initial of G, but the complaint filed on the case may use the full middle name of Gerald, which is the way the name should appear on the case.
5. So, in order to change the name on the case, go to the Parties Tab. Click on the party name to be changed. That brings up the Modify Case Party Details window. From there, click on the + on the line with “Name” to bring up the Select Names window.



6. The check mark in the 1st column indicates which name will be the Primary Name on the case. It will default from the Current Known Name of the party, but is easily changed by clicking on the ‘X’ in front of the desired name. That will change the ‘X’ to a green check mark. So in this example, if the primary name was to be Paul Gerald Martinez, the user would simply click on the ‘X’ in the ‘Primary’ column by that name at the top of the list.
16. Click the Continue button to return to the Modify Case Party Details screen. Click on Continue again to return to the Parties Tab.
17. Be sure to save the case or the changes will not be saved.
18. To change the Current Known Name, go to the Parties Tab. Click on the party name to be changed to bring up the Modify Case Party Details screen.
19. Click on the name again to open the Modify Party screen. This is the global party record.
20. Click on the name that you want to make the Current Known Name to open up the View Name screen.



21. The name fields will be grayed out and unavailable for editing, but the Current Known Name field will be open to click into. Clicking into it will put a check mark there and make the name the Current Known Name on the global party record.
22. The ability to edit the Current Known Name field and the Primary Name on a case are based on the user's rights.
23. When determining what name should be marked as the Current Known Name, consider the following –
 - Current Known Names should reflect the legal, proper name of the party. So they should include middle names and suffix names when they exist. For example, Paul Gerald Martinez should be selected as the Current Known Name as opposed to Paul Martinez or Paul G Martinez. Sometimes it is not always clear which name should be considered the Current Known Name, so it is best not to change the global party record at all; simply add any additional names as aliases and make the Primary Name on the case the name that was filed.
 - Never make nicknames the Current Known Name.
 - Don't make abbreviations the Current Known Name unless that is all you have. For example: don't make "HSD" the Current Known Name when the name "Human Services Department" also exists as a name for the party.
24. Be aware that when the Primary Name on the case is changed, the case style will also be changed as long as the Auto-Style box is checked on the Detail Tab.

M-61-TR-2018-00544 - OdyTest (jidjdavenport)

File View Tools Centers Developer Help

M-61-TR-2018-00544

Summary **Detail** Parties Charges Events Service Hearings Cor

State of New Mexico v. PAUL G MARTINEZ, Jr.
Type Traffic

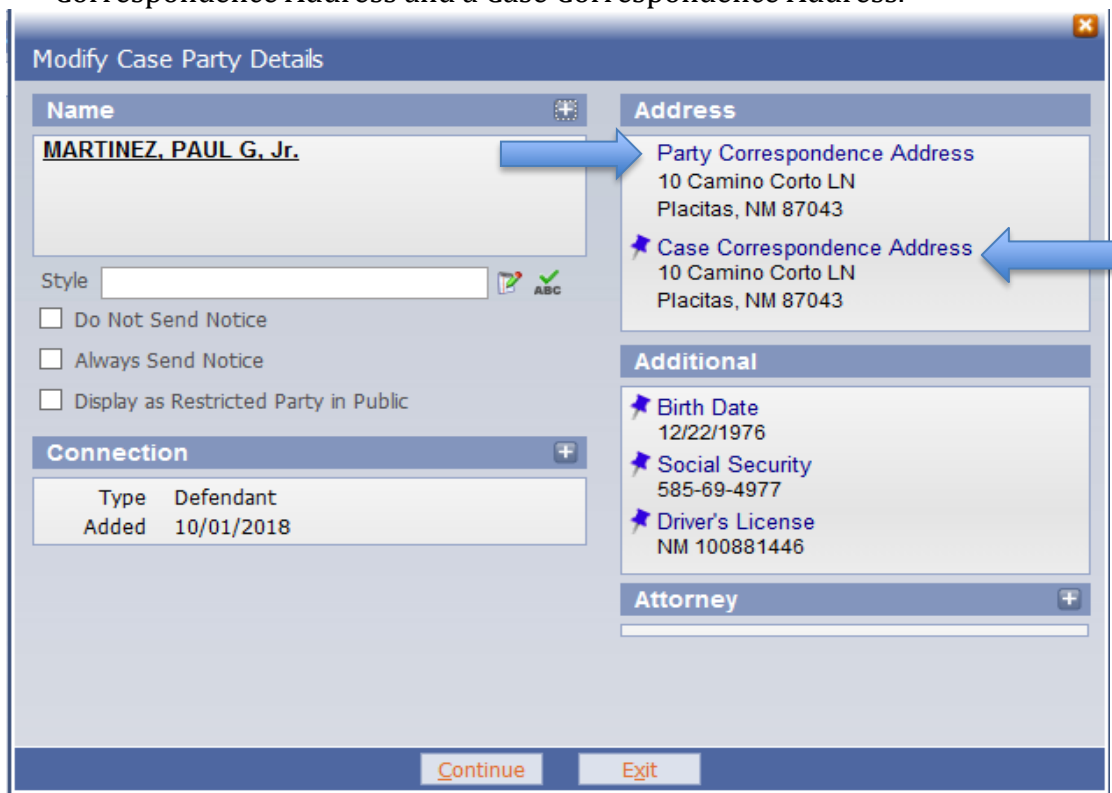
Style State of New Mexico
v.
PAUL G MARTINEZ, Jr.

Auto Style

Case Assignment

ADDING ADDRESSES TO PARTIES

1. While some data, such as names, are added automatically to the global party from the Modify Case Party Details screen as noted above, addresses are not. While Odyssey does provide functionality on the screen to add a new address, the new address you add there will **NOT** be added to the global party record, and thus new addresses should **NEVER** be added from the Modify Case Party Details screen.
2. Remember that all personal data for a party should be available on the global party record so that it can be shared with all courts. If you add addresses from the Modify Case Party Details screen those addresses will not be available to other courts because they will exist solely on your case.
3. There is no limit to the number of addresses Party records may have, but remember that it is also not necessary to enter addresses that already exist, thus creating duplicate records. You may pin any existing address to your case – it does not have to be a new one that you’ve just created.
4. When you view the Modify Case Party Details screen, you can see that there is a Party Correspondence Address and a Case Correspondence Address.



5. The Party Correspondence Address comes from the global party record from the “Current Known Address”. And the Case Correspondence Address should also come from the global party record and be pinned to the case. The significance of having 2 addresses (the Party Correspondence and the Case Correspondence) is that your case data doesn’t change simply because a party moves and another court updates the party’s current known address. For example, if your case is closed and the party moves to a new address, the Party Correspondence Address will be updated, but your Case Correspondence Address will not be updated and the historical record for your will not be changed.

- The “pinning” of addresses, as well as DOBs, SSNs, and DLs, is Odyssey’s way of allowing a party to have multiple records for all of those elements, and still allowing you to associate the one that is applicable to your case.
- Pinning (named after the blue push pin icon) allows you to select the address that you want associated to your case.

Type	Respondent
Added	10/02/2018

- To pin an address, click on the push pin next to the Case Correspondence Address to open the Select the Address to Lock window.

DO NOT USE this “New Address” button!!!

9. Click on the address that should be locked (i.e., pinned) to the case as the Case Correspondence Address.
10. NOTE: If an address is **not** pinned to the case, then the Party Correspondence Address will serve as the Case Correspondence Address, and whenever the Party Correspondence Address is modified, the Case Correspondence Address will be modified as well.
11. Editing or deleting addresses must be done from the level the address was entered, i.e., the global party level or the case level. If an address appears on the case but not on the global party record, then it was entered improperly at the case level and it should be deleted and re-entered correctly from the Modify Party screen.
12. There are several 'qualifiers' that can be added to addresses via the check boxes at the bottom of the screen.

Modify Address

Standard U.S. Standard U.S. With Attn. Non-Standard U.S. Foreign

Line 1

Line 2

Line 3

City State ZIP Code

Start End Source

Current Known Address Undeliverable

Correspondence Address Confidential

Remit To Address Additional Correspondence Address

13. Each of the check boxes will add an icon beside the address when it appears on the Modify Party global record. In addition, an address marked Confidential will appear on the Modify Case Party Detail screen with a lock to indicate it is confidential information.

Modify Case Party Details

Name

Smith, Wanda Lou

Style

Do Not Send Notice

Always Send Notice

Display as Restricted Party in Public

Connection

Type	Petitioner
Added	10/02/2018

Address

Party Correspondence Address
PO Box 1256
Santa Fe, NM 87502

Case Correspondence Address
 112 Rodeo Rd
Building A, Apartment 6
Santa Fe, NM 87501

Additional

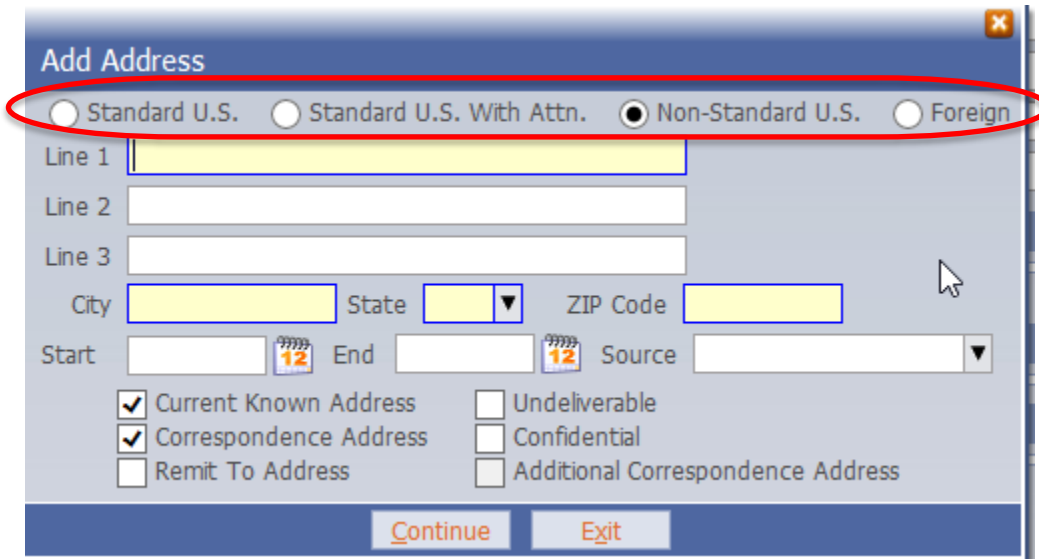
Birth Date
09/22/1996

Social Security
No Social Security

Driver's License
No Driver's License

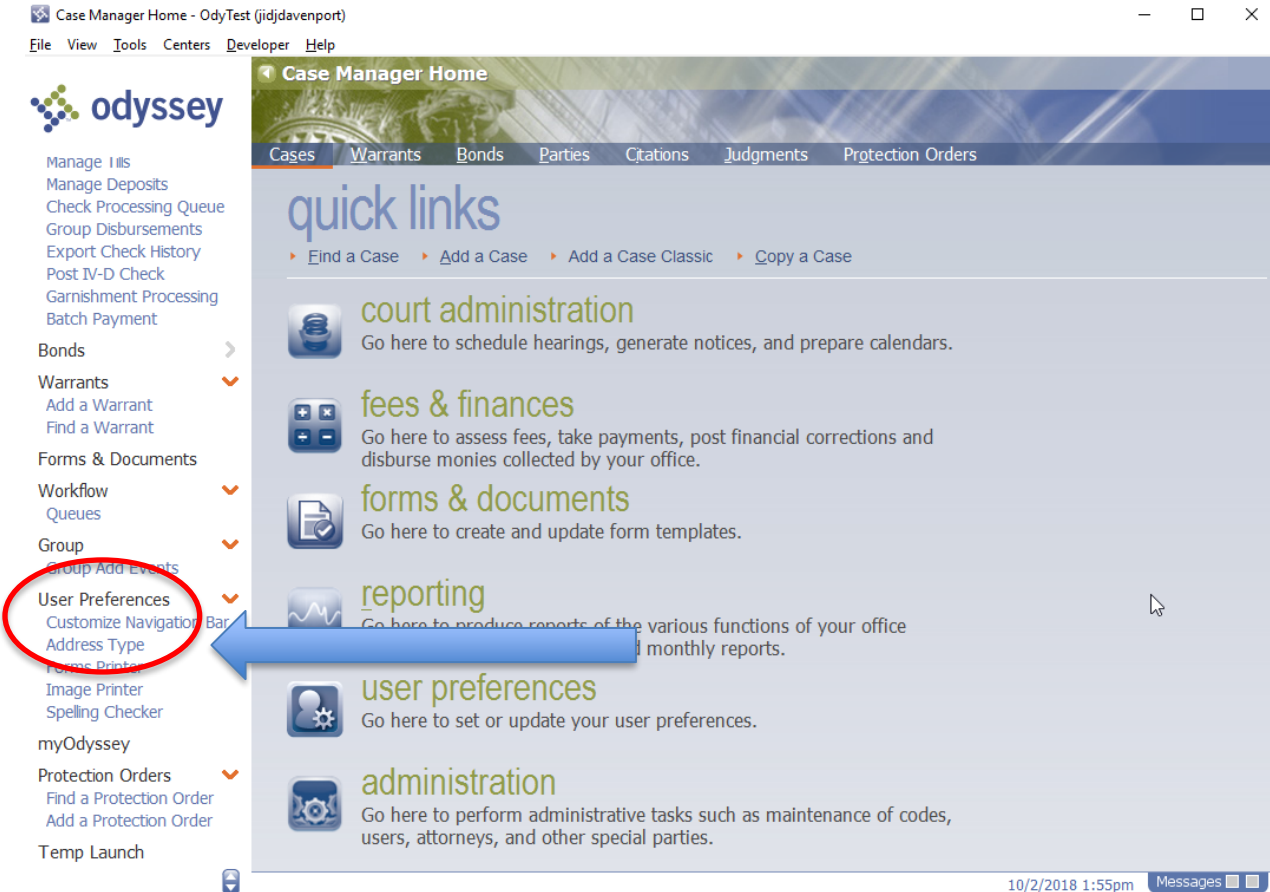
Attorney

14. Another option with addresses is the Address Type: Standard U.S.; Standard U.S. with Attn.; Non-Standard U.S.; and Foreign. These options appear at the top of the Add Address and Modify Address windows, and they control the layout and required fields in the address.



15. The screen will default to the individual user's preference, but can be changed by simply clicking the preferred radio button.

16. Setting the default address type preference is done from User Preferences on the left hand navigation bar.



17. Click on “Address Type” to open up the Select Default Address Type window. Then click on the type that you want to be your default and hit Save.

Select Default Address Type

Select the Address Type to be used as your default when adding addresses.

- Standard U.S.
- Standard U.S. With Attn.
- Non-Standard U.S.
- Foreign

18. DO NOT populate data fields with data that is not intended for that field. Rather you should change the address type to a type that fits the data to be entered.

19. For example, JID often sees addresses like the one below, where “ST” and “SE” have been entered in the field for the street name.

Modify Address

Standard U.S. Standard U.S. With Attn. Non-Standard U.S. Foreign

No. 105 St. TEXAS ST SE

Unit No.

City Albuquerque State NM ZIP Code 87105

Start End Source

Current Known Address Undeliverable
 Correspondence Address Confidential
 Remit To Address Additional Correspondence Address

20. The correct way to enter this information would be --

Modify Address

Standard U.S. Standard U.S. With Attn. Non-Standard U.S. Foreign

No. 105 St. Texas Street Soutl

Unit No.

City Albuquerque State NM ZIP Code 87105

Start End Source

Current Known Address Undeliverable
 Correspondence Address Confidential
 Remit To Address Additional Correspondence Address

21. Selecting the correct address type can prevent this type of data entry error.

RESTRICTING A PARTY ON A CASE

1. Sometimes a party should be restricted on a particular case, but not on all of their cases. This is easily indicated in Odyssey by checking the box "Display as Restricted Party in Public" on the Modify Case Party Details screen. That means that the party record on this case, and only this case, will appear with a lock and will not have the same lock on their global party or their other cases.

Modify Case Party Details

Name: Wilson, Lucy Jay

Style: [] ABC

Do Not Send Notice

Always Send Notice

Display as Restricted Party in Public

Address

Party Correspondence Address
982 1st Street
Las Vegas, NM 87701

Case Correspondence Address
982 1st Street
Las Vegas, NM 87701

Additional

Birth Date: No Birth Date

Social Security: No Social Security

Driver's License: No Driver's License

Attorney: []

Connection

Type	Added
Petitioner	10/09/2018

Continue Exit

2. When this box is checked the party will appear on the case with a lock beside their name.

D-412-DV-2018-00092 - OdyTest (jidjdavenport)

File View Tools Centers Developer Help

D-412-DV-2018-00092

Forms Save Copy Save Exit

Summary Detail Parties Events Service Hearings Conditions Causes Disposition Time Stds Financial

Lucy Jay Wilson v. Frank Wilson
Type: Domestic Violence

Group By: Connection Type

Show: All Connections

Party & Attorney Information

Role	Name
Petitioner	Wilson, Lucy Jay
Respondent	Wilson, Frank

10/9/2018 2:09pm Messages

3. Restricting a party in this manner will only restrict them on this one case, not on all of their other cases.

ADDING PERSONAL IDENTIFIERS TO PARTIES

1. Personal identifiers can be added to parties from either the Modify Case Party Details screen, or the Modify Party screen. Dates of Birth (DOB), Social Security Numbers (SSN) and Driver's License Numbers (DL) can be pinned to a case. It is important to pin the data filed in the case to the case party.
2. From the Parties Tab, click on the party you want to add identifiers to. That opens up the Modify Case Party Details screen. When a case is created and a party added, the information identified as their "current known" will default to the case. And that information will be pinned to the case automatically. If any of the identifiers have not been associated to the party, the screen will display "No Birth Date", or "No Social Security", or "No Driver's License" respectively.

Modify Case Party Details

Name
Kirksey, Walter

Style ABC

Do Not Send Notice
 Always Send Notice
 Display as Restricted Party in Public

Address

Party Correspondence Address
16497 Chapparel Lane
Corrales, NM 87048

Case Correspondence Address
16497 Chapparel Lane
Corrales, NM 87048

Additional

Birth Date
08/06/1988

Social Security
595-42-3374

Driver's License
NM 16489631387

Attorney

Type	Defendant
Added	10/03/2018

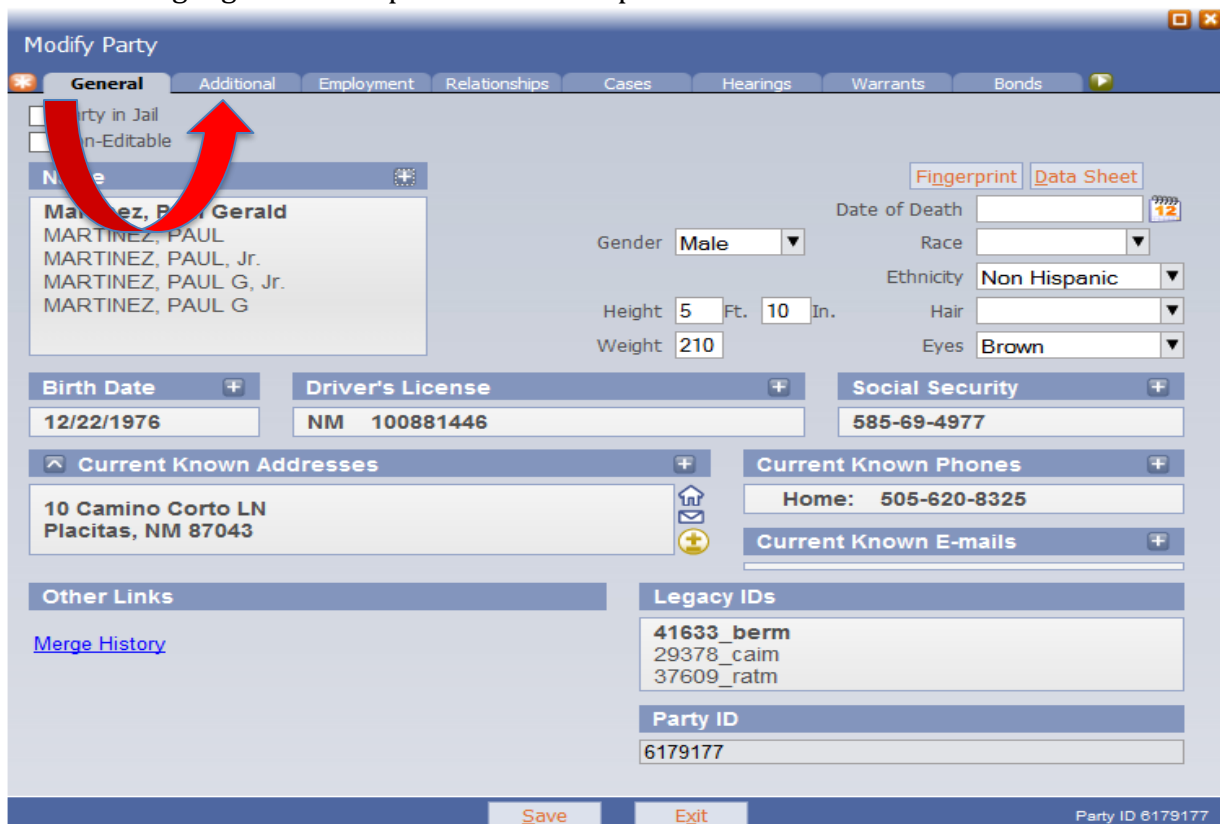
3. If the DOB, SSN or DL information that defaults is not what was filed in your case, click on the blue push pin to select the correct information.
4. That opens the Select Data to Lock screen.



5. Click on the date of birth (or SSN, or DL respectively) that you want to pin to the case.
6. Any DOB, SSN or DL added in this manner will be added automatically to the global party record and should be visible on the Modify Party screen.

ADDING AN INTERPRETER REQUIREMENT TO A PARTY

1. From the Parties Tab, click on the party name that needs the interpreter to open the Modify Case Party Details screen. Click on the name again to open the Modify Party screen.
2. Click on the Additional Tab to indicate that an interpreter is required for the party and what language that interpreter needs to speak.



The screenshot shows the 'Modify Party' application window. The 'Additional' tab is active. The 'Languages' section is highlighted with a red box. It contains a checkbox for 'Needs Interpreter' and a plus sign icon. Other sections include 'Sex Offender Registration', 'Place of Birth', and 'Miscellaneous'.

3. Click on the + to open the Add Language screen.

The screenshot shows the 'Add Language' dialog box. It features a 'Language' dropdown menu, a checked 'Primary language' checkbox, and 'Continue' and 'Exit' buttons at the bottom.

4. From the drop down box select the correct language. Since the display is alphabetical, typing the first one or two letters of the language will shorten the list and show only languages that start with that combination of letters, or languages that come after those.
5. The check mark for "Primary language" will default on the first language entered, and may not be changed until a second language is added. If a party speaks multiple languages, mark the preferred language to indicate the type of interpreter to assign.
6. Once all languages have been added, click the Continue button to return to the Additional Tab.

7. Click the check box "Needs Interpreter". That reminds users to schedule an interpreter when scheduling hearings/trials.

The screenshot displays the 'Modify Party' interface for Paul Gerald Martinez. The 'Additional' tab is active, showing various identification and personal information fields. A red arrow points to the 'Needs Interpreter' checkbox, which is checked. Below this, the 'Languages' section shows 'Spanish' selected. Other sections include 'Sex Offender Registration', 'Place of Birth', and 'Miscellaneous'.

Modify Party

General **Additional** Employment Relationships Cases Hearings Warrants Bonds

Martinez, Paul Gerald DOB: 12/22/1976 DL: NM 100881446 SSN: 585-69-4977

State ID + FBI Number +

SO Number +

Person ID


Other Agency Number +

Scars, Marks and Tattoos +

Physical Descriptors +

Caution Flags + Special Conditions +

Languages +


Needs Interpreter 

Spanish

Emergency Contact

Sex Offender Registration

Registered Sex Offender

Date Last Registered 

Place of Birth

Hospital

Birth Record File #

Time

City

State

County

Country

Miscellaneous

Citizenship


Complexion

Build

Marital Status

Dependents

County of Residence

Approx. DOB 

Save Exit Party ID 6179177