

Administrative Office of the Courts

Supreme Court of New Mexico

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Judicial Information Division (JID)

New Party Features
Standard Operating Procedure
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New Party Features

COURT / DEPARTMENT / DIVISION

District Courts, Magistrate Courts, Metro Court, Supreme Court

USER

Clerks, Court Staff

PURPOSE

Five New Odyssey Party Features, which assist in the management of case Party details. These features are visible on the Global Party Record and a few on the Party Data Sheet.

- Capture Source for Party Address
- Display Date of Birth and Age on the Case
- Maintain Email History
- Phone Number Effective Dates
- Supervision Tab on Party Records

NAVIGATION

Case/Parties Tab/Case Party Record/Global Party Record

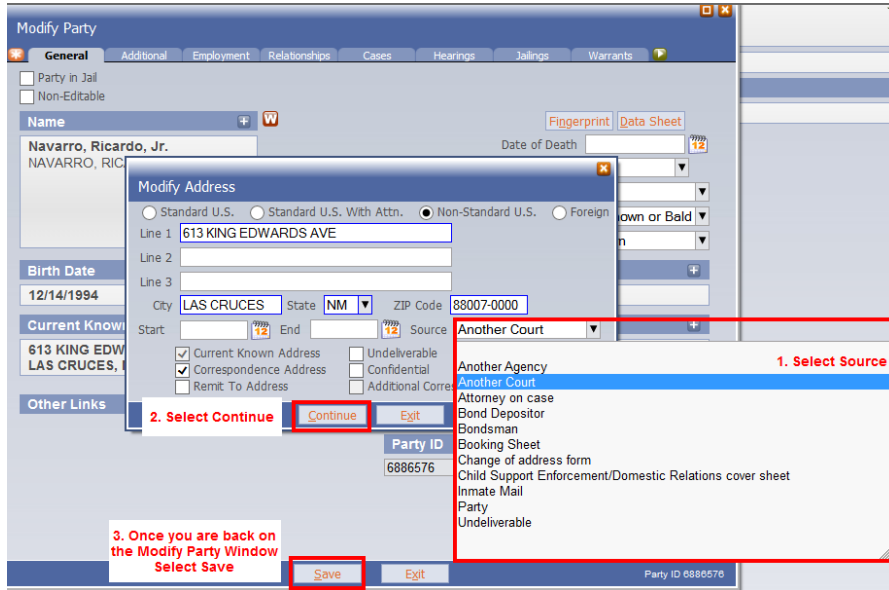
STEPS

Capture Source for Party Address

1. On a case go to the **Parties Tab**
2. Maneuver to the Global Party Record:
 - a. **Left click** on the party's name and the **Modify Case Party Details** screen will open
 - b. Left click on the party name again from the **Modify Case Party Details** screen, which will navigate to the **Modify Party** screen, or the Global Party Record

PLEASE NOTE: If opening a case information is already being added at the Global level.

3. To add an Address Source to the current address
 - a. Click on the existing address under the Current Known Addresses Header pulling up the Modify Address Header window
 - b. Use the pull down arrow on the Source field to select the correct Source
 - c. Select the Continue button and Save from the Modify Party window



Display Date of Birth and Age on the Case

1. On a case go to the **Parties Tab**
2. Providing the party has a Date of Birth entered on the Global Party Record the DOB is now displayed on the Parties tab
3. Parties Connection Types where this new feature is configured:
 - a. In the Matter Of
 - b. In the Matter of Child
 - c. Defendant
 - d. Child
 - e. Minor Child



Maintain Email History

1. On a case go to the **Parties Tab**
2. Maneuver to the Global Party Record:
 - a. **Left click** on the party's name and the **Modify Case Party Details** screen will open
 - b. Left click on the party name again from the **Modify Case Party Details** screen, which takes you to the **Modify Party** screen, or the Global Party Record
 - c. Add the Email Address by clicking on the (+) sign under the **Current Known E-mails** header

The screenshot shows the 'Modify Party' interface. The 'Current Known E-mails' section is expanded, and a red arrow points to a '+' icon next to the section header. Below the header, there is a text input field and a 'Click to add a new E-mail address.' link.

3. Add the first email address in the Email field provided. Ensure that the **Current Known E-mail** is checked and select Continue. Save the party record and then Save at the case level

The screenshot shows the 'Add E-mail' dialog box overlaid on the 'Modify Party' screen. The 'E-mail' field contains 'theemail@yahoo.com'. The 'Current Known E-mail' checkbox is checked, and the 'Additional' checkbox is unchecked. The 'Continue' button is highlighted.

4. Add the Additional Email by selecting the (+). Add the next email address in the E-mail field
 - a. Uncheck the **Current Known E-mail** checkbox and add a checkmark to the **additional** checkbox
 - b. Select Continue and then Save the Party Record

The screenshot shows the 'Add E-mail' dialog box overlaid on the 'Modify Party' screen. The 'E-mail' field contains 'theotheremailaddress@yahoo.com'. The 'Current Known E-mail' checkbox is unchecked, and the 'Additional' checkbox is checked. The 'Continue' button is highlighted. Below the dialog box, the 'Current Known E-mails' section in the background now shows 'theemail@yahoo.com' with a '+' icon next to it.

Phone Number Effective Dates

1. On a case go to the **Parties Tab**
2. Maneuver to the Global Party Record:
 - a. **Left click** on the party's name and the **Modify Case Party Details** screen will open
 - b. Left click on the party name again from the **Modify Case Party Details** screen, which takes you to the **Modify Party** screen, or the Global Party Record
 - c. Add the Phone Number by clicking on the (+) sign under the Current Known Phones header. There are now fields to enter Start and End Dates for telephone numbers
 - d. The telephone **Start date** can be used when the original phone number is given. The **End date** can be used when the party reports that the original number is no longer in use
 - e. Select Continue and then Save the Party Record

The screenshot displays the 'Modify Party' interface. A modal dialog titled 'Add Phone Number' is open, showing the following details:

- Phone Number: 575-525-1818
- Start: 08/19/2016
- End: (empty)
- Radio buttons for Home (selected), Work, Cell, and Fax.
- Checkboxes for 'Current Known Phone' (checked), 'Invalid Phone', and 'Confidential Phone'.

Below the dialog, the 'Current Known Phones' section is visible, showing the phone number and start date. A second 'Current Known Phones' section below it shows the phone number, start date, and end date.

Supervision Tab on Party Records

1. On a case go to the **Parties Tab**
2. Maneuver to the Global Party Record:
 - a. **Left click** on the party's name and the **Modify Case Party Details** screen will open
 - b. Left click on the party name again from the **Modify Case Party Details** screen, which takes you to the **Modify Party** screen, or the Global Party Record
3. There is now a Supervision Tab available via the Global party record

The screenshot shows the 'Modify Party' interface. At the top, there is a navigation bar with tabs: Bonds, Financial, Prot. Orders, Notes, **Supervision** (highlighted with a red box), Referrals, Associates, and Vehicles. Below the navigation bar, there are checkboxes for 'Party in Jail' and 'Non-Editable'. The main area contains a 'Name' field with 'Navarro, Ricardo, Jr.' and 'NAVARRO, RICARDO'. To the right are fields for 'Date of Death', 'Race', 'Ethnicity', 'Hair', and 'Eyes'. Below these are fields for 'Height' (5 Ft. 8 In.) and 'Weight' (176). Further down are sections for 'Birth Date' (12/14/1994), 'Driver's License' (NM 511576610), and 'Social Security' (648-05-3434). At the bottom, there are sections for 'Current Known Addresses' (613 KING EDWARDS AVE, LAS CRUCES, NM 88007-0000) and 'Current Known Phones' (Home: 575-525-1818, Start: 08/19/2016, End: 08/19/2016). There is also a section for 'Current Known E-mails' with two addresses: theemail@yahoo.com and theotheremailaddress@yahoo.com.

The screenshot shows the 'Modify Party' interface with the 'Supervision' tab selected. The navigation bar now has 'Supervision' highlighted. Below the navigation bar, there is a header for 'Navarro, Ricardo, Jr.' with 'DOB: 12/14/1994', 'DL: NM 511576610', and 'SSN: 648-05-3434'. Below this are filters for 'Locations' (All), 'Types' (All), 'Group By' (Case Number), and 'Sort' (Start Date). There is also a checkbox for 'Show Terminated'. The main area is titled 'Supervisions' and contains the text: 'No supervision cases exist for this party.'

Note: When adding **Additional Party Information** to the Party Record of a case, it must be **Saved** at all levels for the newly entered information to remain.

The 'Modify Party' screen displays various fields for a party named 'Navarro, Ricardo, Jr. NAVARRO, RICARDO'. Fields include Name, Gender (Male), Date of Birth (12/14/1994), Driver's License (NM 511576610), Social Security (648-05-3434), Current Known Addresses (613 KING EDWARDS AVE, LAS CRUCES, NM 88007-0000), Current Known Phones, Current Known E-mails (theemail@yahoo.com, theotheremailaddress@yahoo.com), and Legacy IDs (Party ID: 6896576). A red box highlights the 'Save' button at the bottom.

Save at the Global Party Level (Modify Party Screen)

The 'Modify Case Party Details' screen shows details for 'NAVARRO, RICARDO AKA Navarro, Ricardo, Jr.'. It includes sections for Name, Address (Party and Case Correspondence), Connection (Type: Defendant, Added: 01/04/2016), Additional information (Birth Date, Social Security, Driver's License), and Attorney (Cain, Michael E.). A red box highlights the 'Continue' button at the bottom.

Continue at the Case Party Level (Modify Case Party Details Screen)

The case summary screen for 'M-14-TR-2016-00001' shows 'State of New Mexico v. RICARDO NAVARRO' with a status of 'Inactive'. It lists 'Defendant' as 'NAVARRO, RICARDO' (DOB: 12/14/1994, Age: 21Y 8M, AKA Navarro, Ricardo, Jr.) with attorney 'Cain, Michael E.'. The 'Plaintiff' is 'State of New Mexico'. The 'Participant & Attorney Information' section lists 'Officer' as 'Flores, Aaron, Ofc'. A red box and arrow highlight the 'Save' button in the top right corner.

Finally - Save the Case