

# Administrative Office of the Courts

Supreme Court of New Mexico

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## Judicial Information Division (JID)

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2014 Copying Case Entities  
**Standard Operating Procedure**  
**Version 1.0**  
*Updated: (08/2016)*

## 2014 Copying Case Entities

### COURT / DEPARTMENT / DIVISION

All Courts

### USER

Clerks, Court Staff

### PURPOSE

To copy specific case entities from the source case to related target cases.

### NAVIGATION

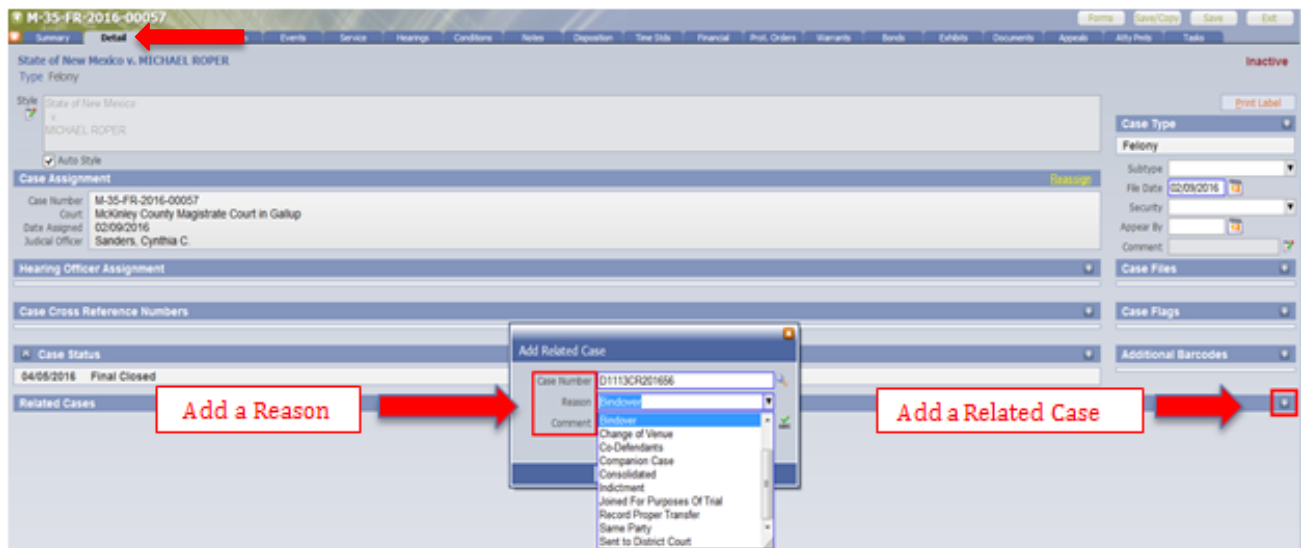
Odyssey/Case Management/Detail Tab/Related Cases

### STEPS

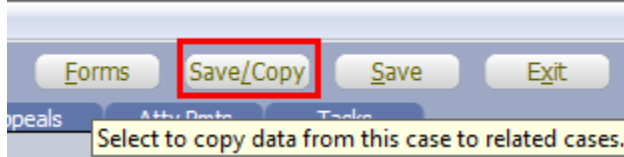
This process can be used for case **Events, Exhibits, Charges, Documents, Future Hearings, and Parties.**

To copy case entities:

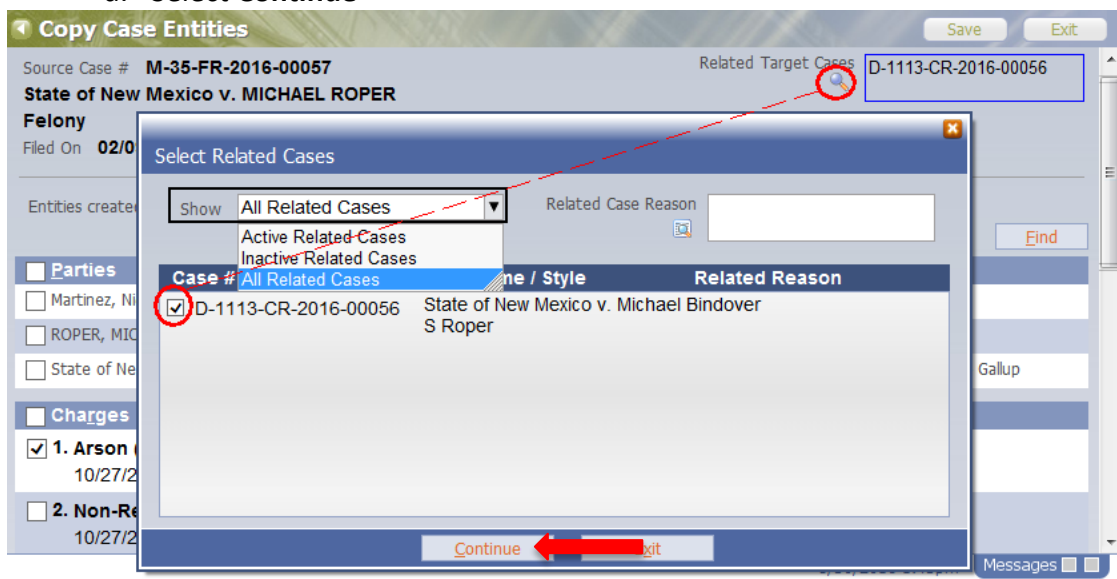
1. Find a case
2. Navigate to the case **Detail** Tab
  - a. Under the **Related Cases** header (at the bottom of the screen, add a Related case by selecting the **(+)** sign and entering the case number
  - b. Add a **Reason** by selecting from the pull down field
  - c. Add a **comment** if needed and select **Continue** to save



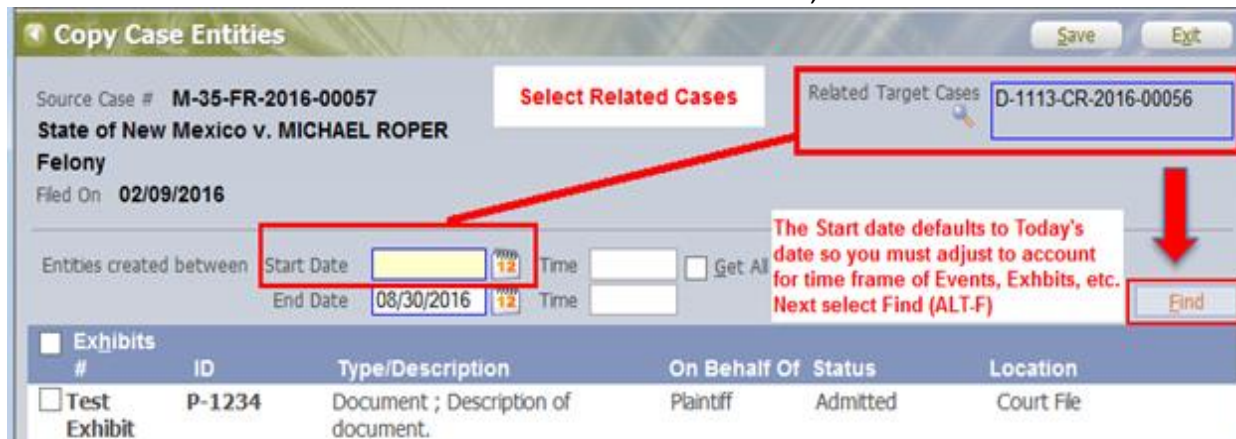
3. At the top of the Case window, click the **Save/Copy** button



- On the **Copy Case Entities** window, click on the **magnifying glass icon** under **Related Target Cases**
- Set the Show Display field pull-down to **All Related Cases**
- Select the **Related Target Case(s)** by clicking to add a **checkmark** in the box next to the case number listed
- Select **Continue**



4. Next set the **Start Date** to on or before the case Filed date, then select **Find**



5. Pick desired entities under each grouping header: **Parties, Charges, Events, Documents, Exhibits, and Future Hearings** that will be copied to the **Target case**
  - a. To select the entity put a **checkmark** in the box next to the entity desired
  - b. To select all entities in the grouping put a **checkmark** in the box next to the grouping. See the Exhibits example below
  - c. When selection is complete, click the **Save** button on the top-right of the screen

Copy Case Entities

Source Case # M-35-FR-2016-00057  
State of New Mexico v. MICHAEL ROPER  
Filed On 02/09/2016  
Related Target Cases D-1113-CR-2016-00056

Entities created between Start Date 02/09/2016 End Date 08/30/2016

Parties	Target Case Connection	Attorneys
<input type="checkbox"/> Martínez, Nicolás, Ofc (Officer)		
<input type="checkbox"/> ROPER, MICHAEL (Defendant)		<input type="checkbox"/> #Holander, Linda
<input type="checkbox"/> State of New Mexico (Plaintiff)		<input type="checkbox"/> #19N District Attorney 11th - Gallup

Charges

- 1. Arson (Over \$20,000)  
10/27/2015 (F2) 30-17-5(A) 4728
- 2. Non-Residential Burglary  
10/27/2015 (F4) 30-16-3(B) 1056

Events

Events	Documents on Events
<input type="checkbox"/> 02/09/2016 OPN: CRIMINAL COMPLAINT FILED	<input type="checkbox"/> 02/09/2016 OPN: CRIMINAL COMPLAINT FILED
<input type="checkbox"/> 03/11/2016 ORD: SETTING CONDITIONS OF RELEASE ON BAIL BOND FILED	<input type="checkbox"/> 03/11/2016 ORD: SETTING CONDITIONS OF RELEASE ON BAIL BOND FI
<input type="checkbox"/> 03/11/2016 Conditional Order of Appointment	<input type="checkbox"/> 03/11/2016 Conditional Order of Appointment
<input type="checkbox"/> 03/30/2016 WAIVER OF PRELIMINARY HEARING FILED	<input type="checkbox"/> 03/30/2016 WAIVER OF PRELIMINARY HEARING FILED
<input type="checkbox"/> 03/30/2016 TITLE PAGE OF TRANSCRIPT Party: Defendant ROPER, MICHAEL	<input type="checkbox"/> 03/30/2016 TITLE PAGE OF TRANSCRIPT
<input type="checkbox"/> 03/30/2016 ORD: Order On Preliminary Examination - Bind Over	<input type="checkbox"/> 03/30/2016 ORD: Order On Preliminary Examination - Bind Over
<input checked="" type="checkbox"/> 04/04/2016 CRIMINAL INFORMATION FILED	<input type="checkbox"/> 04/05/2016 CRIMINAL INFORMATION FILED
<input type="checkbox"/> 04/05/2016 CLS: BIND OVER	

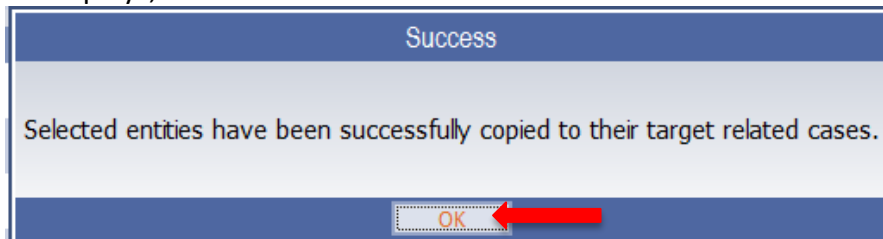
Documents

- 02/09/2016
- 03/11/2016 Preliminary Examination

Exhibits

#	ID	Type/Description	On Behalf Of	Status	Location
<input checked="" type="checkbox"/>					
<input checked="" type="checkbox"/>	P-1234	Document ; Description of document.	Plaintiff	Admitted	Court File
<input checked="" type="checkbox"/>	2334556	D-222334 Computer File	Defendant		

6. The case will then save, and a message showing the entities are copied to the Target case displays, click **OK**



7. A check of the **Related Case** will show that the entities selected are now copied to the **Target Case**

Exhibit ID / Exhibit #	On Behalf of / Status	Custody Detail	Type / Description
D-222334 2334556	Defendant		Computer File
P-1234 Test Exhibit	Plaintiff Admitted	<a href="#">Court File</a>	Document; Description of document.