

Administrative Office of the Courts

Supreme Court of New Mexico

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Judicial Information Division (JID)

Juror Questionnaire Privacy
and Destruction
Standard Operating Procedure
Version 1.0
(06/2019)

Approved by OJUG 10/17/2019

Title of Procedure

COURT / DEPARTMENT / DIVISION

Trial Courts

USER

Court staff responsible for distributing Juror Questionnaires and receiving the Certificates of Privacy and Destruction

PURPOSE

To provide courts with a standardized procedure for distributing Juror Questionnaires and docketing of the Certificates of Privacy and Destruction

INTRODUCTION

Rules 5-606, 6-605 and 7-605, as amended in 2018, require completed juror qualification and questionnaire forms, including any electronic copies, in the possession of the court, attorneys, parties, and any other individual or entity to be destroyed. Courts are required to destroy the original and all copies in their possession ninety (90) days after expiration of the term of service unless an order is entered ordering the forms be kept for a longer period of time. All questionnaires entered into Jury Management System will be destroyed by the vendor. Attorneys, parties, and any other individual or entity are required to destroy all copies in their possession within one hundred twenty (120) days after final disposition of the proceeding for which the juror or prospective juror was called unless an order is entered permitting the copies be kept for a longer period of time.

Attorneys and parties are required to file a certificate with the court certifying they have complied with the above rules. This certificate must be made under oath. *See copy of the form as approved by the Supreme Court, attached as Appendix A.*

Courts are required to record in Odyssey each time juror questionnaires are distributed to an attorney, party, or any other individual or entity. Courts are also required to record in Odyssey all privacy and destruction certificates filed with the court. At this time, courts are not required to track or identify attorneys or parties that fail to file a certificate. However, there is nothing prohibiting a court from doing so. Steps are set forth in this SOP in case a court chooses to do so at this time and/or if it is required at a future date.

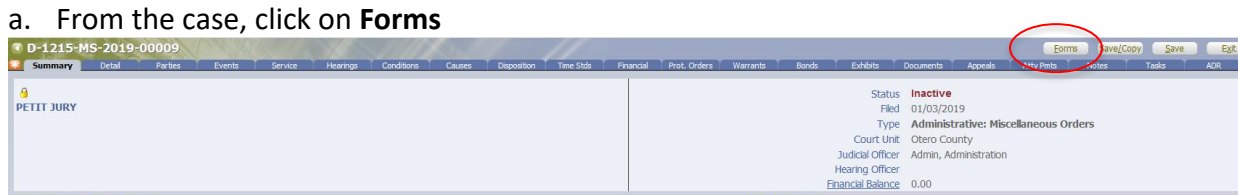
The rules and this procedure also apply to supplemental juror questionnaires.

STEPS

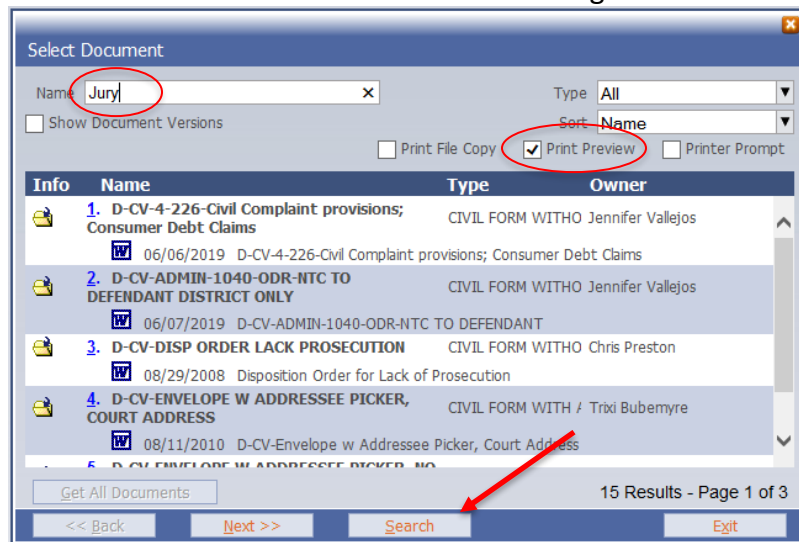
A. DISTRIBUTION OF JUROR QUESTIONNAIRES

1. Courts shall distribute copies of juror questionnaires to an attorney, party, or any other individual or entity in a manner consistent with law, policy and procedure.

- Current processes range from paper to electronic copies and from specific assigned panel(s) per case to a group of panels for a specific period of time or term of service
2. All copies of juror questionnaires shall be accompanied with a Certificate of Juror Questionnaire Privacy and Destruction with the appropriate style of case. If the questionnaires are distributed for a term of service and not for an individual case, Courts shall use a miscellaneous administrative non-case for this purpose. Courts that have an existing miscellaneous administrative non-case for petit juror may use that case for this purpose
 3. The certificate is a form in Odyssey and can be printed with the style of case already on it. Print the form from Odyssey by following the steps below:
 - a. From the case, click on **Forms**



- b. Select the “Certificate of Privacy and Destruction – Jury” from the list of forms. You can search for the certificate by typing a keyword in the **Name** field, then enter or click on **Search**
- c. It is recommended that **Print Preview** be checked so the document merges as an editable Word Document in case changes need to be made before printing



4. Record the distribution of the juror questionnaire(s) in Odyssey by following the steps below:
 - a. From the case, click on the **Events Tab**
 - b. Click on the plus (+) sign to add an event
 - c. In the **Add Event** dialog box, enter “6863” or use Alt+F4 to search for event code 6863 CRT: Juror Questionnaires Distributed. This event is a CRT event for Court Use Only, available in all case categories except Family, is not docketable or included on appeal and no image is expected. However, if the Court prepares a certificate or receipt of delivery, the certificate/receipt may be

scanned to this event. Please note, it will not be seen by anyone other than court users

- d. 'Given To' is a required field. Use the picker box to select the attorney, party, individual or entity receiving the questionnaire(s). A separate event must be docketed for each recipient. Example: If the attorney for the plaintiff receives a copy of the questionnaire(s), that attorney would be selected in the 'Given To' field on the event docketed in this step. If the Defendant also receives a copy of the questionnaire(s), this event must be docketed a second time and the Defendant would be selected in the 'Given To' field on the second event
 - i. If the recipient is not a party or attorney on the case, but is an entity connected to a party or attorney, the Court must select the party or attorney that entity is connected with in the 'Given To' field and identify entity in the 'Comment' field

The screenshot shows a 'Modify Event' window with the following details:

- Type: CRT: Juror Questionnaires Distributed
- Date: 05/20/2019 (with a '12' icon indicating a 120-day extension)
- Time: 10:17 AM
- Given To: Plaintiff
- Due: 09/17/2019 (with a '12' icon)
- Comment: Questionnaires for Jury Panel #306-3 provided to the DA's Office
- Document Type: (empty)
- Document Security Group: (empty)
- Doc Link ID: Does not affect case aging clock

Buttons at the bottom: Save/Print, Save, Exit.

- e. The event is configured with an automatic due date of 120 days from the event date

05/20/2019 CRT: Juror Questionnaires Distributed Questionnaires for Jury Panel #306-3 provided to the DA's Office
Given To: Plaintiff State of New Mexico
Due: 09/17/2019

- f. To extend the due date to 120 from the commencement of the jury trial or end of term of service, click on the date in the 'Due' field and enter the extended date. The shortcut of "t+120" can be entered in this field if the 120 days count should begin today (t=today)

Modify Event

Type: CRT: Juror Questionnaires Distributed

Date: 07/18/2019 Time: 10:17 AM

Given To: Plaintiff

Due: t-120 Completed: []

Comment: Questionnaires for Jury Panel #306-3 provided to the DA's Office

Docketable Include on Appeal

Print Event Barcode Upon Save

Document Type: []

Document Security Group: []

Doc Link ID: []

Does not affect case aging clock

Save/Print Save Exit

- g. This will create an action item due that can be seen on the **Summary Tab**. See Step C to run a report of action items due

[flags & actions due](#)
[09/17/2019 Review CRT: Juror Questionnaires Distributed](#)

- h. It is recommended that the jury panel or pool be identified by number in the 'Comment' field

Modify Event

Type: CRT: Juror Questionnaires Distributed

Date: 05/20/2019 Time: 10:17 AM

Given To: Plaintiff

Due: 09/17/2019 Completed: []

Comment: Questionnaires for Jury Panel #306-3 provided to the DA's Office

Docketable Include on Appeal

Print Event Barcode Upon Save

Document Type: []

Document Security Group: []

Doc Link ID: []


Does not affect case aging clock

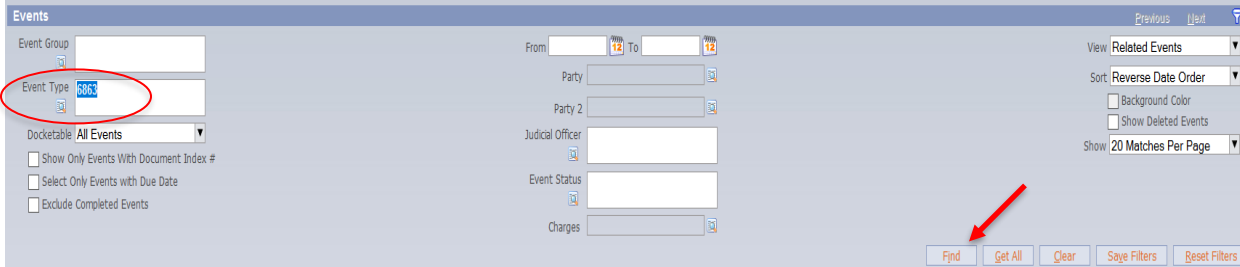
Save/Print Save Exit

- i. **Save**

B. RECEIVING COMPLETED CERTIFICATE OF PRIVACY AND DESTRUCTION

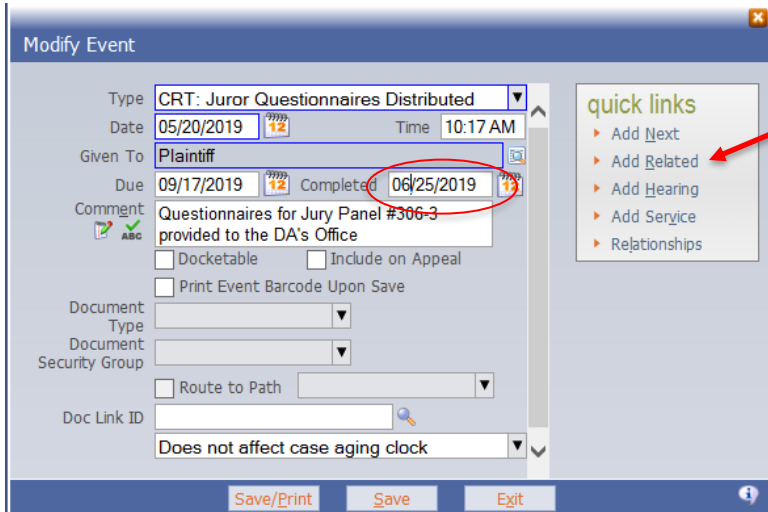
1. When the completed Certificate of Privacy and Destruction is returned to the Court, file stamp the certificate. If the certificate is submitted through File & Serve, verify the correct filing code has been selected. If not, change the code before accepting it
2. Record the Certificate of Privacy and Destruction in Odyssey by following the steps below:
 - a. From the case, click on the **Events Tab**
 - b. Locate the CRT: Juror Questionnaires Distributed event that was previously docketed. This event could have been docketed several months in the past so it may be easier to search for the event using the filter functionality

- i. Click on the filter sign 
- ii. Enter 6863 in the **Event Type** field or use the picker box to search for it
- iii. Click **Find**



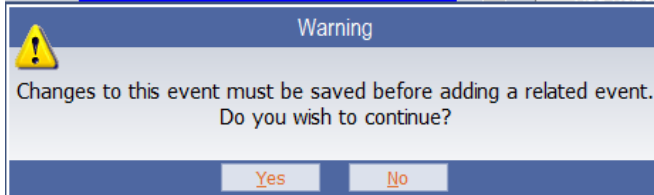
The screenshot shows the 'Events' search interface. The 'Event Type' field is highlighted with a red circle and contains the value '6863'. A red arrow points to the 'Find' button at the bottom right of the interface.

- iv. Once located, left click on the event to modify the event
- c. In the **Modify Event** dialog box, enter the file stamp date on the certificate in the **Completed** field
 - d. Click **Add Related**



The screenshot shows the 'Modify Event' dialog box. The 'Completed' date field is circled in red and contains the value '06/25/2019'. A red arrow points to the 'Add Related' link in the 'quick links' panel on the right side of the dialog.

- e. A warning about saving the event before adding a related event will pop-up, click **Yes** to save and add an related event



The screenshot shows a warning dialog box with a yellow warning icon. The text reads: "Changes to this event must be saved before adding a related event. Do you wish to continue?" with "Yes" and "No" buttons.

- f. In the **Add Event** dialog box, enter "6864" or use Alt+F4 to search for event code 6864 Juror Questionnaire Privacy & Destruction Certificate. This event is available in all case categories except Family, is docketable and included on appeal. An image is expected. The event and image may be seen by non-court users through online access like SOPA, Research, etc.
- g. 'Returned By' is a required field. Use the picker box to select the attorney, party or entity filing the certificate. A separate event must be docketed for each certificate
 - i. If the filer is not a party or attorney on the case, but is an entity representing a party or attorney, the Court must select the party or

attorney that entity is connected with in the 'Returned By' field and identify entity in the 'Comment' field

The screenshot shows the 'Add Event' form with the following details:

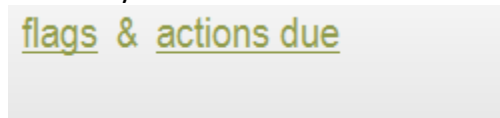
- Type: Certificate of Juror Questionnaire Destruct
- Date: 06/25/2019
- Time: 9:44 AM
- Returned By: Plaintiff
- Due: [blank]
- Comment: by DA's Office
- Checkboxes: Docketable, Include on Appeal, Print Event Barcode Upon Save
- Doc Link ID: Does not affect case aging clock

h. Save

Date	Type and Comment
05/20/2019	CRT: Juror Questionnaires Distributed Questionnaires for Jury Panel #306-3 provided to the DA's Office Given To: Plaintiff State of New Mexico Due: 09/17/2019 Completed: 06/25/2019
06/25/2019	Certificate of Juror Questionnaire Destruction by DA's Office Returned By: Plaintiff State of New Mexico

i. Scan the certificate to the event

3. If the certificate is e-Filed, go to the case and to the Juror Questionnaire Distributed event for the recipient filing the Certificate of Privacy and Destruction, complete the due date and relate the two events
4. Verify the item was removed from the actions due on the **Summary Tab**



C. IDENTIFYING PAST DUE CERTIFICATES

1. At this time, courts are not required to track or identify attorneys or parties that fail to file a certificate. However, Courts that wish to do so may run a report to identify Juror Questionnaires Distributed events with a due date that has not been completed by following the steps below:
 - a. **Reports**



- Case Manager Home
- myOdyssey
- Temp Launch
- Searches >
- Add a Case
- Add a Case Classic
- Add a Citation
- Protection Orders >
- Court Administration >
- Fees & Finances >
- Bonds >
- Warrants >
- Forms & Documents
- List Manager
- Workflow >
- Group >
- Reports

b. Under Case Analysis Reports, click on Case Management



c. Select Event Review

- Event Listing
 - Lists event types, who entered the event, and either the event date/time or the date/time entered.
- Event Review
 - Produce a list of cases for which there are events that are scheduled to be reviewed for a particular due date range. The report also calls attention to cases with overdue events.

d. Select the following parameters:

- i. **Locations:** use the locations box to select the Court node(s)
- ii. **Case Category:** type "ALL" in the field or use the picker box to select a particular case category or **Select All** depending on the case categories the events with outstanding due dates is sought
- iii. **Case Type:** type "ALL" in the field or use the picker box to select particular case types or **Select All** depending on the case categories the events with outstanding due dates is sought. If the Court uses a miscellaneous administrative non-case for this purpose, make sure to include **Administrative:** case types
- iv. **Event Types:** type "6863" in the field or use the picker box to select the CRT: Juror Questionnaires Distributed event

The screenshot shows a search filter interface with the following fields and values:

- Locations: San Miguel County
- Case Category: All
- Case Type: All
- Case Subtypes: (empty)
- Case Status: (empty)
- Event Types: CRT: Juror Questionnaires Distributed

There are also two checkboxes: "Include Cases without a Subtype" and "Is Current Status", both of which are unchecked.

- v. **Scheduled Review Date:** enter a start date and end date for the time frame sought. This will be the due date, not the event docket date. Recommendation is from the date the process began to the date the report is being ran. The shortcut to enter today's date is "t"

The screenshot shows the "Scheduled Review Date" section with the following fields and values:

- Start Date: 01012019 (Tuesday, January 1, 2019)
- End Date: t (Thursday, June 20, 2019)

- vi. **Report Options:** check the box to **Include Inactive Cases**

The screenshot shows the "Report Options" section with the following checkboxes:

- Include Completed Events
- Include Inactive Cases
- Exclude Cases with Warrants
- Include Group ID
- Include Document Index #

- vii. **Sort Order:** use the drop down list to select the sort order desired. Recommend using "Event Due Date, Case#"
- viii. **List Name:** to save the cases returned to a list in List Manager, enter a name in this field

The screenshot shows a report configuration interface with the following fields and options:

- Locations:** San Miguel County
- Case Category:** All
- Case Type:** All
- Case Subtypes:** (Empty)
- Case Status:** (Empty)
- Event Types:** CRT: Juror Questionnaires Distributed
- Scheduled Review Date:** Start Date: 01012019 (Tuesday, January 1, 2019); End Date: 06252019 (Tuesday, June 25, 2019)
- Event Status:** (Empty)
- Event Status Date Range:** Start Date: (Empty); End Date: (Empty)
- Report Options:**
 - Include Completed Events
 - Include Inactive Cases
 - Exclude Cases with Warrants
 - Include Group ID
 - Include Document Index #
- Sort Order:** Event Due Date, Case #
- Security Group:** (Empty)
- Case Judicial Officers:** (Empty)
- Event Judicial Officers:** (Empty)
- Case Hearing Officer:** (Empty)
- List Name:** Jury Certificates Past Due

If this list name already exists for your user-id, the results of this report will overwrite the existing list.

Append Job ID Number to List Name

- ix. Once the parameters are entered, **Memorize** to save the parameters; **Submit** to run the report; or click **Schedule** to schedule the report to run on a reoccurring basis

A row of buttons for report actions: Clear, Memorize, Recall, Schedule, Submit, Exit.

- x. When the report has ran, a message will flash at the bottom of the Odyssey window
- xi. Click on the message to view the report and/or the 'Messages' box in the lower right-hand corner will turn green. Click on the blue 'Messages' tab to open the Messages Center and see the list of reports available. Click on the report to open the report

4/15/2019 4:34pm Messages  

- xii. Once the report opens, “Ctrl + P” or click the printer icon to print the report; “Ctrl + S” or click on the disk to save the report
- xiii. If a ‘List Name’ was entered, open List Manager and load the report to view the cases

APPENDIX A

9-513D. Juror questionnaire privacy and destruction certification.

[For use with Rules 5-606, 6-605, 7-605]

STATE OF NEW MEXICO

COUNTY
COURT

_____, Plaintiff,

v. No. _____

_____, Defendant.

**JUROR QUESTIONNAIRE
PRIVACY AND DESTRUCTION CERTIFICATION**

I, _____, certify and affirm under penalty of perjury under the laws of the State of New Mexico that I have complied with the confidentiality and destruction requirements in Rule [5-606(E)] [6-605(G)] [7-605(G)] NMRA.

Signature of person making certification and affirmation

Printed name of person making certification and affirmation

USE NOTE

1. This form must be filed by all attorneys and parties within one hundred twenty (120) days after final disposition of the proceeding for which the juror or prospective juror was called unless permitted by written order of the court to retain copies for a longer period of time or within the deadline otherwise set by court order.

[Approved by Supreme Court Order No. 18-8300-008, effective December 31, 2018.]