

Administrative Office of the Courts

Supreme Court of New Mexico

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Judicial Information Division (JID)

General Civil Case Initiation Standard Operating Procedure Version 1.0

Updated: 07/2016

General Civil Case initiation

COURT / DEPARTMENT / DIVISION

Magistrate and Metro Court

USER

Court personnel

PURPOSE

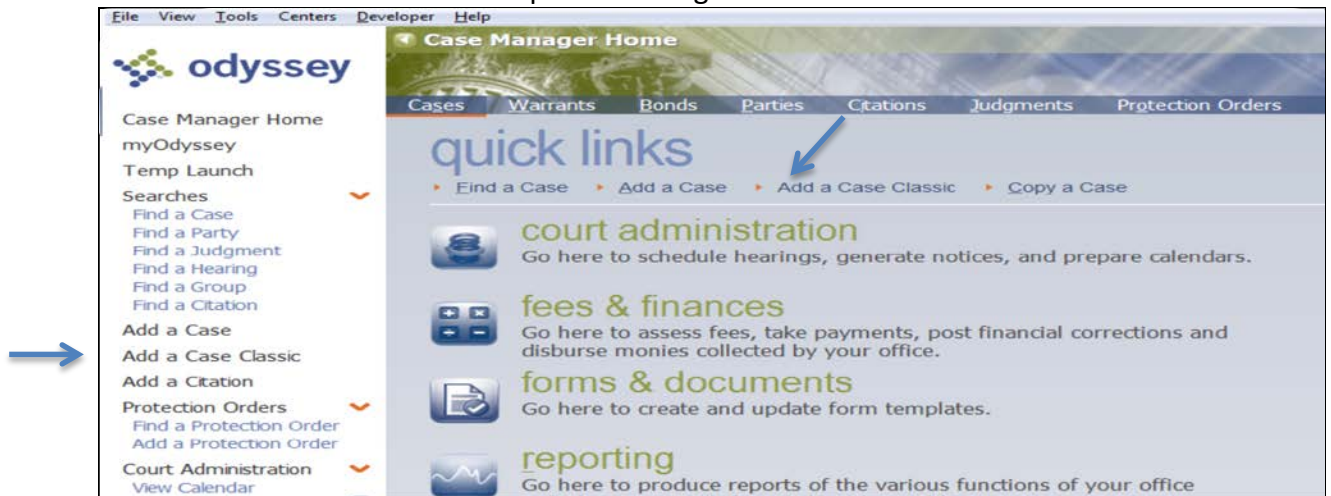
To initiate of a General Civil Case

NAVIGATION

Case Manager/Add a Case Classic

STEPS

1. Access the Case Manager Home Page
 - a. Select **Add a Case Classic** from top or left navigation bar



- b. Select the appropriate location/node



- c. On the **Add a New Case** screen, select Civil, then for Case Category on the right select the General Civil



2. Review **Detail** tab

- a. The **Add a New Case** page is displayed. The **Detail** tab defaults/the style may need to be modified so that the parties reflect what is shown on the complaint that was filed. The

application data will be automatically populated, verify the case filing date and modify the date per the petition or complaint, if not the current date

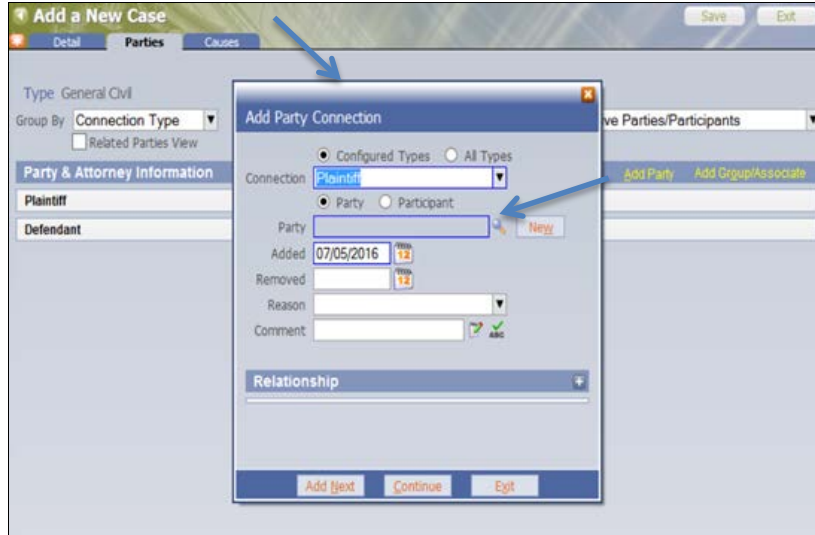
The screenshot shows the 'Add a New Case' application window with the 'Detail' tab selected. The 'Type' is set to 'General Civil'. The 'Case Assignment' section includes fields for 'Case Number' (System Assigned), 'Court' (Dona Ana County Magistrate Court II), 'Date Assigned' (07/05/2016), and 'Judicial Officer' (System Assigned). The 'Hearing Officer Assignment' section has a 'Date Assigned' field and a 'Hearing Officer' dropdown. The 'Case Cross Reference Numbers' section has 'Number' and 'Type' fields. The 'Case Files' section shows 'Clerks' Office'. The 'Case Flags' section is empty.

3. Review **Parties** tab

- a. Select **Parties** tab at the top of the **Add a New Case** screen, right-click on the **Plaintiff**, then click **Add Plaintiff**

The screenshot shows the 'Add a New Case' application window with the 'Parties' tab selected. The 'Type' is 'General Civil'. The 'Group By' is 'Connection Type' and 'Show' is 'Active Parties/Participants'. The 'Party & Attorney Information' section has 'Add Party' and 'Add Group/Associate' buttons. The 'Plaintiff' and 'Defendant' fields are visible, with an 'Add Plaintiff' button next to the Plaintiff field.

- b. On the **Add Party Connection** screen confirm that the party is not already in Odyssey by clicking on the magnifying glass next to the Party field



- c. On the **Find a Party** screen, enter the last and first name of the Plaintiff, then click **Search**

Best Practice: It is a best practice to first search for a party name to see if name is already in Odyssey to avoid duplicates; this can be done by clicking on the magnifying glass to the right of the party field.

- d. If the party, the Plaintiff in this case, does not exist, the **Party Search Results** will show as 'No Match found'. Select **Add Party**.

- e. If the party is new, add all party information that is in the filing document, include the physical and correspondence addresses. Do not omit any personal identifying information that is available.
- f. Click **Save**, then **Continue**

reloper Help

Add a New Case

Add A New Plaintiff

Name Description

Person Nickname Business

Date of Birth [] Date of Death []

Title [] Gender Male Race []

First Agapito Ethnicity []

Middle []

Last Cruces

Suffix []

Identifiers

Driver's License [] State []

Social Security []

Address Phones and E-Mail

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

Home [] Ext []

Line 1 P.O. Box 0 Work [] Ext []

Line 2 [] Fax [] Ext []

Line 3 [] Cell [] Ext []

City Las Cruces State NM ZIP Code 87452

Add a New Case

Detail Parties Causes

Type General Civil

Group By Connection Type

Party & Attorney Information

Plaintiff

Defendant

Add Party Connection

Configured Types All Types

Connection Plaintiff

Party Participant

Party Cruces, Agapito

Added 07/05/2016

Removed []

Reason []

Comment []

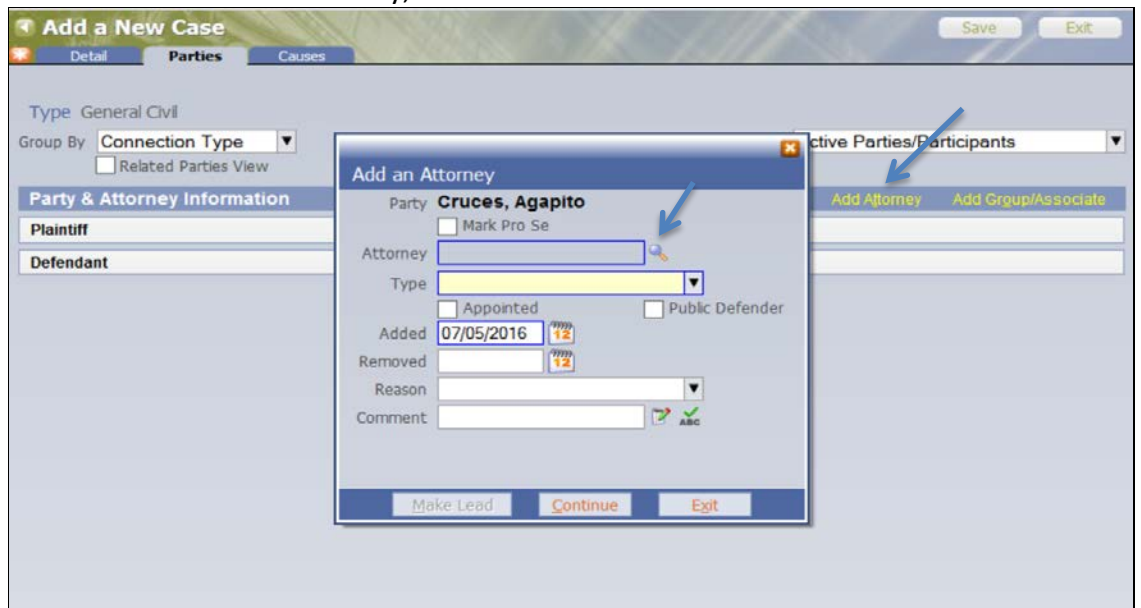
Relationship []

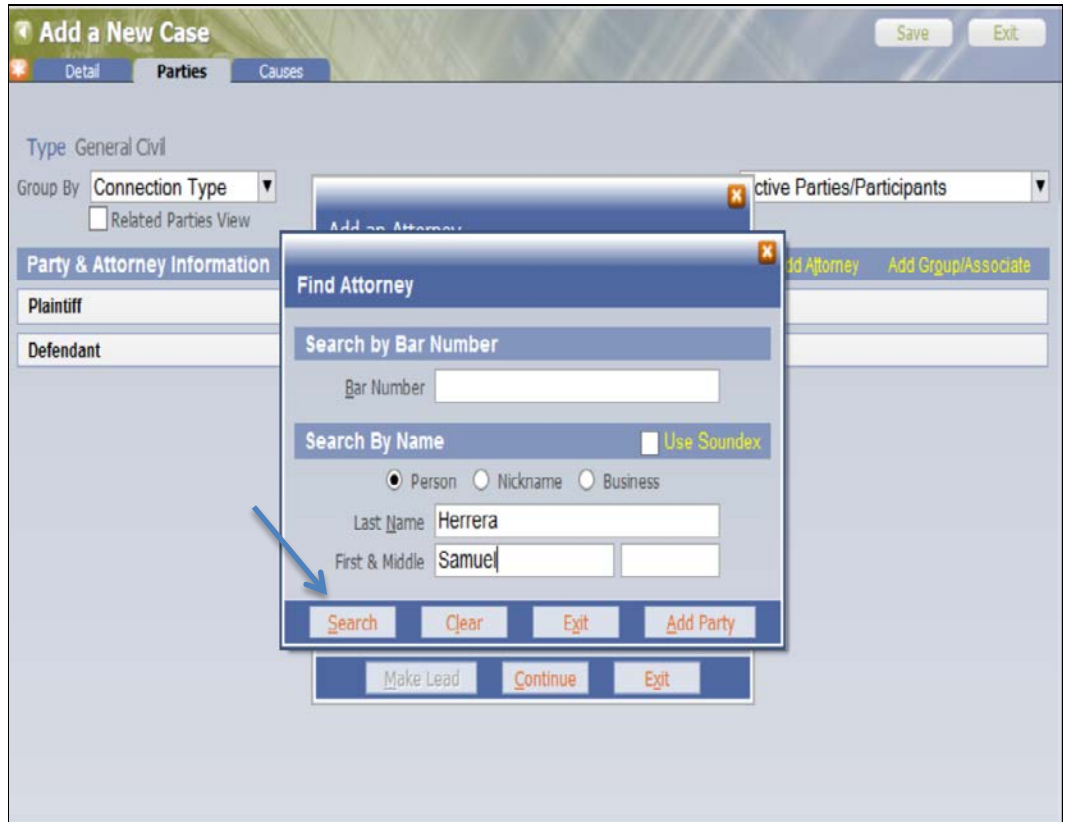
Add Next Continue Exit

g. The **Add a New Case** Screen will now have the Plaintiff's name appear



- h. Next, add the Defendant by following the same steps as the Plaintiff
 - i. Right click on **Defendant** to add defendant to the case
 - ii. Always search for the defendant's name before adding a new one, this can be done by clicking on the magnifying glass to the right of the party field.
 - iii. If the party is new, add all party information that is in the filing document, include the physical and correspondence addresses. Do not omit any personal identifying information that is available.
 - iv. If the plaintiff is represented by an attorney, click on **Add Attorney**
 - v. On the **Add an Attorney** screen select the plaintiff associated with the party, and search for the attorney by clicking on the magnifying glass, then enter last and first name of attorney, select **Search**





- i. Click on the attorney's name; his/her name will populate the **Add Attorney** screen, then select **Continue**
- j. For **Type**, elect the type of attorney, then click **Save**

Add a New Case Save Exit

Detail Parties Causes

Agapito Cruces, Plaintiff(s) v. Adronico Cruces, Defendant(s)
Type: General Civil

Group By: Connection Type Show: Active Parties/Participants

Related Parties View

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

Plaintiff	Cruces, Agapito	★ Herrera, Samuel M.
Defendant	Cruces, Adronico	★ Lopez, Anthony

7/5/2016 12:30pm Messages

- k. If the Defendant is represented by an attorney, click on Add Attorney, and follow the same steps as instructed when adding the attorney for the plaintiff, but select defendant associated with the party
 - i. For **Type**, select the type of attorney, then click **Save**
 - ii. If no attorney is added the party is assumed to be self-represented

3. Review Causes tab

- a. For **Causes**, select a Cause Code

Add a New Case Save Exit

Detail Parties Causes

Agapito Cruces, Plaintiff(s) v. Adronico Cruces, Defendant(s)
Type: General Civil

Cause of Action Detail

Action Type: Action

Cause Code: Debt and Money Due File Date: 07/05/2016

Description:

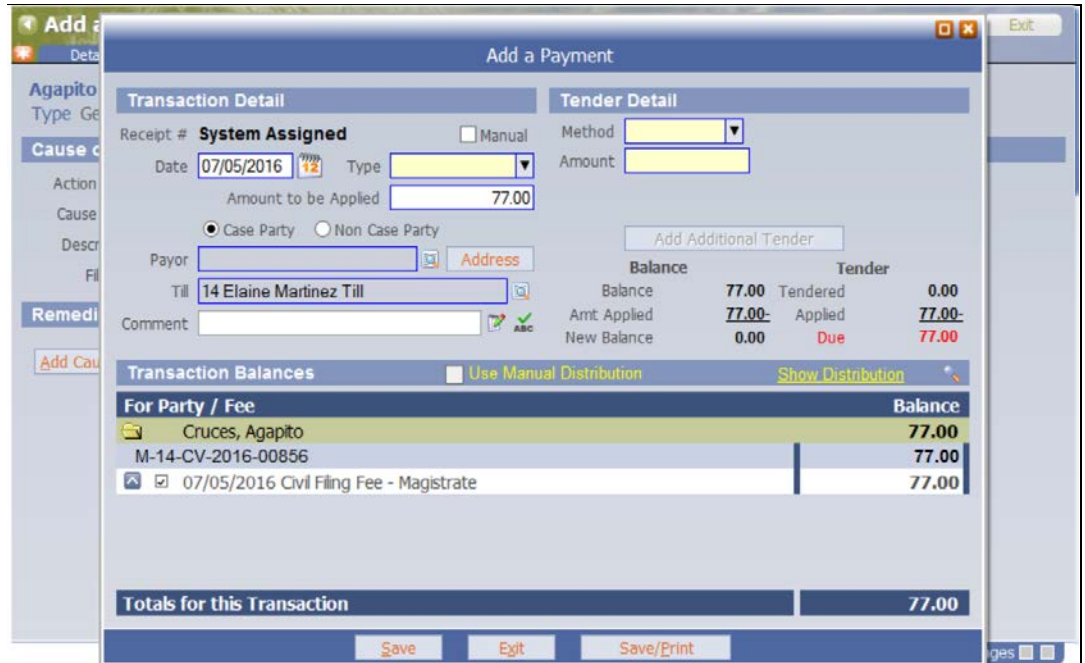
Filed By: Plaintiff Filed Against: Defendant

Remedies Sought

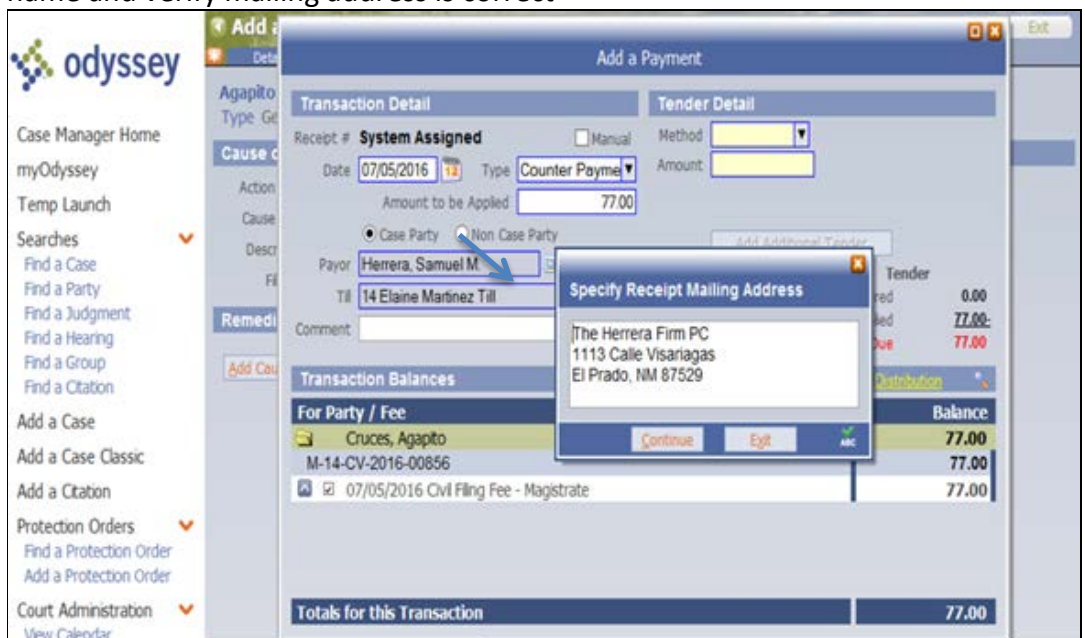
Add Cause

4. Save Case

- a. After all of the required information is entered, the case can be saved
 - b. To save the case: Click the **Save** or (ALT=S) on the title bar
5. Process Payment
- a. When the case is saved the Add a payment screen will be displayed.
 - b. Under the **Transaction Detail** section, select the type of payment received and the amount to be applied should default in.



- c. Select Case Party if party from case is making a payment
- d. Click on magnifying glass to search for Payer; list will be displayed, select name and verify mailing address is correct



- e. Under the **Tender Detail** section select the method of payment from the drop down; if it is a check or a money order include reference number (check number).

The screenshot shows the 'Add a Payment' window. The 'Transaction Detail' section includes fields for Receipt # (System Assigned), Date (07/05/2016), Type (Counter Payment), Amount to be Applied (77.00), and Payor (Herrera, Samuel M.). The 'Tender Detail' section shows a dropdown menu with 'Cash' selected. Below, a table shows transaction balances for Cruces, Agapito, with a total of 77.00.

For Party / Fee	Balance
Cruces, Agapito	77.00
M-14-CV-2016-00856	77.00
07/05/2016 Civil Filing Fee - Magistrate	77.00

Totals for this Transaction: 77.00

- f. Then enter the amount received from the payer
- g. Click **Save and Print** button and give payer copy of receipt

The screenshot shows the 'Add a Payment' window. The 'Tender Detail' section shows 'Cash' selected and the amount 77.00 entered. The 'Save and Print' button is highlighted with a blue arrow.

Add a Payment

Transaction Detail: Receipt # System Assigned, Date 07/05/2016, Type Counter Payme, Amount to be Applied 77.00, Payor Herrera, Samuel M, Till 14 Elaine Martinez.

Tender Detail: Method Cash, Amount 77.00.

Tender	
00	Tendered 77.00
00	Applied 77.00
00	Change 0.00

Transaction Balances:

For Party / Fee	Balance
Cruces, Agapito	77.00
M-14-CV-2016-00856	77.00
07/05/2016 Civil Filing Fee - Magistrate	77.00

Totals for this Transaction: 77.00

- h. The case number is automatically generated and displayed and Judge is automatically assigned
- i. **Click Edit Case** on the Case Filed screen to generate the Civil summons

Add a New Case

Case Filed: M-14-CV-2016-00856

civil

General Civil
Filed On 07/05/2016

Agapito Cruces, Plaintiff(s) v. Adronico Cruces, Defendant(s)

assignment
Dona Ana County Magistrate Court in Las Cruces
Jacquez, Richard M.

quick links:
• Edit Case
• Add Fees
• Print Label

add another case:
• Same Type
• Same Party
• New Type

- j. Click the **Forms** button to generate the **Civil Summons and Answer** packet



M-14-CV-2016-00856

Forms Save Copy Save Exit

Summary Detail Parties Events Service Hearings Conditions Causes Disposition

Agapito Cruces, Plaintiff(s) v. Adronico Cruces, Defendant (s)

Status **Pending**

Filed 07/05/2016

Type **General Civil**

Court Unit Dona Ana County Magistrate Court in Las Cruces

Judicial Officer Jacquez, Richard M.

Hearing Officer

Financial Balance 0.00

Causes Dispositions

Causes	Dispositions
1. Debt and Money Due	Action 07/05/2016

Most Recent **Events & Hearings** **Case Docket**

07/05/2016 OPN: GENERAL CIVIL COMPLAINT FILED

[time standards](#)

[case file](#)
Clerks' Office

[flags & actions due](#)

7/5/2016 12:37pm Messages