

Administrative Office of the Courts

Supreme Court of New Mexico

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Judicial Information Division (JID)

Performance Measure Clearance Rate Report by
Court Location

Standard Operating Procedure

Version 1.0

Effective: 09/13/2020

Performance Measure Clearance Rate Report by Court Location

COURT / DEPARTMENT / DIVISION

This procedure is for Judges, their TCAAs and court staff who track caseloads.

PURPOSE

The purpose of the standard operating procedure is to guide the user through the configuration running and scheduling of the Performance Measure Clearance Rate Report by Court Location.

INTRODUCTION

There are two versions of this report: One that is run by judge and one that is run by court location. Both versions allow the user to request a summary, detail or both. The detail provides the case numbers and what category they fit into for the report.

NAVIGATION

Click on Run an Enterprise Custom Report on the Odyssey navigation bar and then on the name of the report.

NUMBERED STEPS

Case Manager Home - [Case Manager] Production
File View Tools Centers Developer Help

odyssey

Case Manager Home

Cases Warrants Bonds Parties Citations Judgments Protection Orders

quick links

- Find a Case
- Add a Case
- Add a Case Classic
- Copy a Case

court administration
Go here to schedule hearings, generate notices, and prepare calendars.

fees & finances
Go here to assess fees, take payments, post financial corrections and disburse monies collected by your office.

forms & documents
Go here to create and update form templates.

reporting
Go here to produce reports of the various functions of your office including statistical, financial, and monthly reports.

user preferences
Go here to set or update your user preferences.

administration
Go here to perform administrative tasks such as maintenance of codes, users, attorneys, and other special parties.

Enterprise Custom Rep
Run an Enterprise Custom Report
Configure

User Preferences
Customize Navigation Bar
Address Type
Forms Printer
Image Printer
Spelling Checker

Administration
View Job Queue
View Job History

Click Here

1. From the Odyssey Home Page, click on Run an Enterprise Custom Report.

PMR - Clearance Rates - by Court Location: JID-ClearanceRates2NOJudge-MMD This report allows the user to select one or multiple Court Locations for Clearance Ra

PMR - Clearance Rates for Trial Courts JID-ClearanceRates2-MMD This measure gauges whether a court is keeping up with its incoming caseload. If a

PMR - Days to Legal Permanency (Case PMR_DaystoLegalPermanencyCaseDet PMR - Days to Legal Permanency (Case Details)

PMR - Days to Legal Permanency (Ext: PMR_Time_to_Legal_permanency_Ext By Court: Reports the median number of days from date petition is filed to final plac

PMR - Days to Legal Permanency (Int: PMR_Time_to_Legal_permanency_Int PMR - Days to Legal Permanency (Internal)

2. Then click on PMR – Clearance Rates by Court Location.

PMR - Clearance Rates - by Court Location

This report allows the user to select one or multiple Court Locations for Clearance Rate data. This measure gauges whether a court(s) is keeping up with its incoming caseload. If a court(s) is resolving fewer cases than are filed with the court(s), a growing inventory of pending cases is inevitable. Knowledge of clearance rates for various case types over a period of time can help the court(s) identify emerging problems and target improvements.

[Clear](#) [Memorize](#) [Recall](#)

1 Start Date

2 End Date

3 Court

4 Case Category

5 Display ▼

6 Output Format ▼

[Submit](#) [Schedule](#) [Exit](#)

3. The PMR – Clearance Rates - by Court Location dialog box will display.
 - 1) Enter the start date for the report.
 - 2) Enter the End date for the report. (The start date and end dates will usually cover a month or a quarter.)

Note: The creators of Odyssey have been very creative with date shortcuts. These are very helpful when setting up/scheduling reports to run regularly. B (or b) = the beginning of the month. E (or e) = the end of the month. B (b) – 3 will give you the beginning of the month 3 months prior. (Example in October, b-3 will equal the first of July and e-1 will equal the end of September – allowing the report to be run for a quarter. If the desire is to run a report on the first day of the month for the previous month, then b-1 and e -1 should be used.


- 3) Court Location. Click on the picker box icon and select the court location(s).

- 4) Case Category. The choices are Appellate, Civil, Criminal, Family and Probate or Mental Health. (The New Mexico Judiciary does not use the Appellate category at this time. District Courts have cases in the Civil, Criminal, Family and Probate or Mental Health categories while Magistrate and Metro courts have cases in the civil and criminal categories.)
- 5) Display – select from the choices: Detail, Detail & Summary or Summary.
- 6) Output Format – This report can be run as a List Manager, Microsoft Excel or PDF.

PMR - Clearance Rates - by Court Location

This report allows the user to select one or multiple Court Locations for Clearance Rate data. This measure gauges whether a court(s) is keeping up with its incoming caseload. If a court(s) is resolving fewer cases than are filed with the court(s), a growing inventory of pending cases is inevitable. Knowledge of clearance rates for various case types over a period of time can help the court(s) identify emerging problems and target improvements.

Start Date:  Saturday, August 1, 2020

End Date:  Monday, August 31, 2020

Court: 

Case Category: 

Display: ▼

Output Format: ▼

Click the Submit button



4. Click the Submit button at the bottom of the dialog box.

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Add Email Notification Recipients

To: swinsor@nmcourts.gov

Cc:

Bcc:

Comment:

Attach Any Files Generated by Job

Attach Any Files Generated by Job and Keep Files in Job History

Copy Job Files to Directory

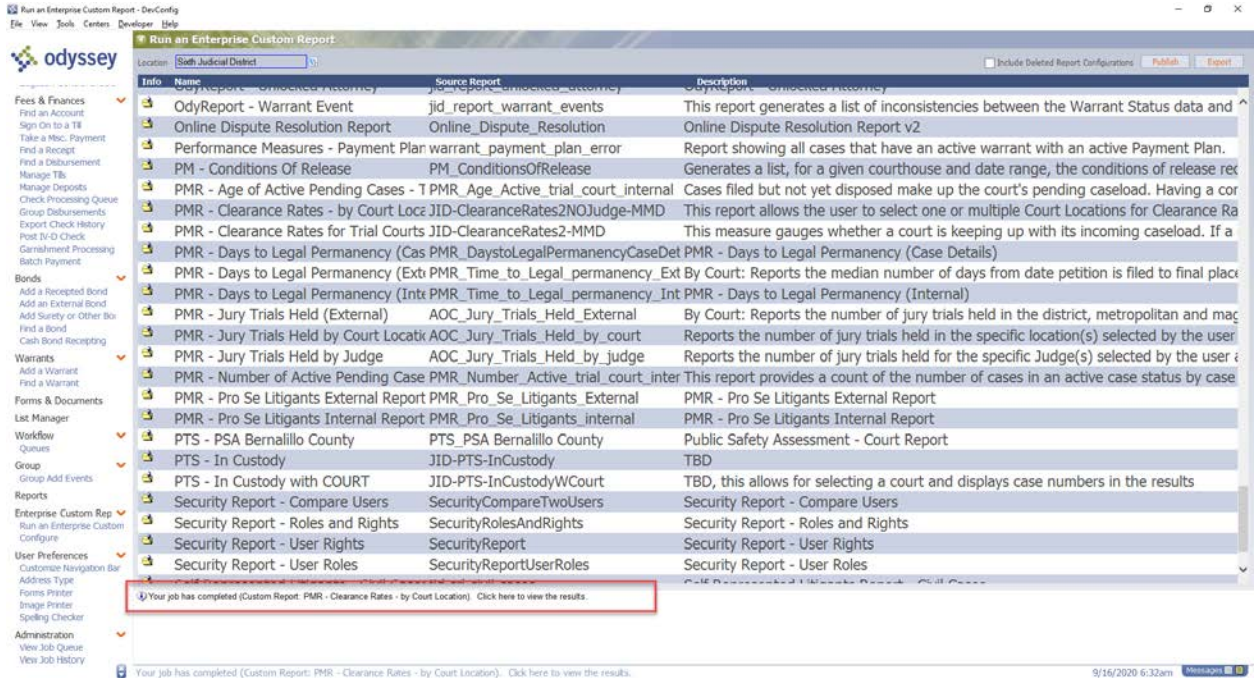
Directory:

Cancel Finish

Submit Schedule Exit

Click the Finish button to run the report

5. The Add Email Notification Recipients dialog box will display. Enter the email addresses for court staff who should receive the report. This is often the CEO, Court Manager or others in court administration. Click the middle check box labeled Attach Any Files Generated by Job and Keep Files in Job History. Click Finish.



- When the report has run, an email notification will be sent to court staff whose email addresses were listed in the Add Email Notification Recipients dialog box and a message will display in the message window at the bottom of Odyssey. Click on that message to open the report.

Clearance Rates

Start Date: 9/1/2020
 End Date: 9/30/2020

Court(s): DEMING District Court LORDSBURG District Court SILVER CITY District Court
 Case Category(-ies): Civil,Criminal,Family,Probate or Mental Health
 Display: Detail & Summary

Open Total	Reopened Total	Reactivated Total	Inactivated Total	Closed Total	Overall Clearance Rate
173	88	11	41	284	119.49%

Case Category	Open Total	Reopened Total	Reactivated Total	Inactivated Total	Closed Total	Clearance Rate per Case Category
Civil	56	8	0	0	71	110.94%
Criminal	42	60	7	41	110	138.53%
Family	60	19	4	0	92	110.84%
Probate or Mental Health	15	1	0	0	11	68.75%

County	Court	Case Category	Case Type	New	Re Open	Re Activated	In Activated	Closed	Clearance Rate
GRANT COUNTY	SILVER CITY DISTRICT COURT	Civil	Civil Appeals - Defendant Appellant	2	0	0	0	0	0.0%
GRANT COUNTY	SILVER CITY DISTRICT COURT	Civil	Civil Violations, Statutes, Ordinances	0	0	0	0	1	
GRANT COUNTY	SILVER CITY DISTRICT COURT	Civil	Contract/Debt & Money Due	11	2	0	0	25	192.3%
GRANT COUNTY	SILVER CITY DISTRICT COURT	Civil	Criminal Record Expungement	1	0	0	0	0	0.0%
GRANT COUNTY	SILVER CITY DISTRICT COURT	Civil	Miscellaneous Civil	7	2	0	0	7	77.8%

Author: JID Data Quality Team

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10/13/2020 5:33:20 PM

- Examine the report to be sure it is set up in the appropriate manner. When the report is set correctly, the report may be scheduled to run automatically.

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Start Date:  Saturday, August 1, 2020

End Date:  Monday, August 31, 2020

Court: 

Case Category: 

Display: 

Output Format: 

Click on the Schedule button

- To schedule the report, click back into the PMR – Clearance Rates by Court Location Dialog. It will hold the settings that were entered. Click the Schedule button at the bottom of the dialog box.

PMR - Clearance Rates - by Court Location


This report allows the user to select one or multiple Court Locations for Clearance Rate data. This measure gauges whether a court(s) is keeping up with its incoming caseload. If a court(s) is resolving fewer cases than are filed with the court(s), a growing inventory of pending cases is inevitable. Knowledge of clearance rates for various case types over a period of time can help the court(s) identify emerging problems and target improvements.

Add Job Schedule Entry

Job Definition

Job Definition **Enterprise Custom Reporting Job**

Description **Custom Report: PMR - Clearance Rates - by**

Start Date  12 Start Time

Comment

Click the recurring symbol

9. The Add Job Schedule Entry dialog box will display. Click the recurring symbol in the upper right-hand corner of the box.

Add Job Recurrence

Job Definition **Enterprise Custom Reporting Job**

Description **Custom Report: PMR - Clearance Rates - by Court Location**

Comment

Recurrence

Start Time **6:00 AM**

How often does this job recur?

Hourly

Day **1** of every **1** month(s)

Daily

The **Third** **Wednesday**

of every **1** month(s)

Weekly

Monthly

Yearly

When does this recurrence start and end?

Start Date: **09/16/2020**

No end date

End after: **10** occurrences

End by: **12/31/2021**

What is the approach for job sequencing on this recurrence?

Run recurring job as configured

Do not start next recurrence of job until the current job in this job definition has completed processing

Do not start next recurrence of job until the following jobs have completed processing

Job Definitions

Save **Exit**

10. The Add Job Recurrence dialog box will display. Set the job (running of the report) to occur as the judge requires. The illustration is set up with an example. Then click Save.
11. If a job is set to recur, and it needs to be cancelled because it is no longer what is needed, a service desk ticket must be submitted to JID to delete the job; otherwise the emails will continue to arrive.