



New Mexico
Courts

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JID University - F&S Review Tool Status Update 5

1 message

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All File & Serve Users,

You all have been amazingly patient and extremely helpful during this process of upgrading, troubleshooting, and dealing with the continuous delivery of File & Serve updates from Tyler Technologies. Thank you!

Below is a list of newly fixed issues, bugs or new development installed in New Mexico's Production File & Serve application since November 9.

As always, continue to send your issues to support@nmcourts.gov so we can work with you and Tyler Technologies to resolve them.

Review Tool Status Update - #5

What's been fixed?

1. **Actions.** The correct review action options will display for reviewers instead of carrying forward from one filing to the next.
2. **Actions.** The Reject action option now displays after adding stamps to certain documents.
3. **Action History.** A new option under the 3 ellipses of an envelope shows all of the actions taken, who took them, and which queue the envelope was in at the time. This option does not display if the queue is filtered on just one envelope.
4. **All Active Filings View.** From the hamburger menu, clerks can use the Envelope Lookup option to see all active filings, with Filters, Envelope Details, and an Export option. The file stamped version of the document cannot be accessed from here yet.
5. **Auto Refresh.** The auto refresh checkbox will remain checked as reviewers move between screens during the same web session. To save the checkbox from one web session to another, use the Save Filters option from the Apply button's dropdown menu.
6. **Copy Docket Date.** Selecting the Copy Docket Date button will display the original submission date/time in the file stamp of a copied and resubmitted envelope.
7. **Court Admin.** F&S court administrators will now have the ability to delete users in their firm from the Court Admin screen.

8. **Court Admin.** F&S court administrators will be able to see all nodes when granting rights to users in the Court Admin screen.
9. **Display.** The zoom setting will be remembered from one document to the next and one envelope to the next.
10. **Documents.** Documents now show their orientation correctly when displaying in the review queue (some some had been displaying in the wrong orientation).
11. **Documents.** When a document has an issue that results in it failing to load, clerks should no longer see the "Network Failure" message, but instead an error code that will help the development team triage the issue.
12. **Errored Filings.** Where forwarding is configured, errored filings can now be forwarded.
13. **Export Review History or All Active Filings.** Clerks will now be able to export an Excel spreadsheet of the information that is displayed on their Review History screen or the Envelope Lookup screen using the Export button.
14. **Forwarding.** Envelope should no longer freeze after applying stamps/annotations and attempting to forward (where forwarding is configured).
15. **Parties.** Clerks can change the party type of any new party on a case, whether they are a required party or not.
16. **Review Queue and Review History Order.** The Review Queue is now sorted by submitted date/time order and the Review History screen is sorted by date reviewed date/time order.
17. **Rotate Page.** Before applying manual stamps, clerks can rotate pages. If stamps have been applied already, the rotation will wipe out the stamps. To prevent that, after applying stamps, the clerk can End Review and reopen the envelope to then rotate the page without losing the manual stamps that had been applied.
18. **Signatures and Seals.** Image stamps (signatures and seals) for staff have been reset.
19. **Service Only.** Envelopes for service only will no longer be seen in the review queue.
20. **Verify Parties.** When verifying parties, the party information is now reset between searches so the previous party's information does not display in an instance where the second party search returns no results.

What's still broken?

1. **Appellate Fields.** Initial filings at the Court of Appeals and the Supreme Court have two required fields that have to have an entry before the envelope can be reviewed
2. **Courtesy Copy.** The courtesy copy field is not developed yet
3. **Court Admin.** Cannot modify users, add new users, add new attorneys, add a payment account, modify the firm information, or reset a user's password (Tyler will do this for NM for now)
4. **DOB Field Error.** The DOB must be xx/xx/xxxx or you cannot proceed, but there is no error message or visual hint (ghost text has been added as an interim measure)
5. **Documents.** Hyperlinks to the file stamped copy in the Review Tool and the notification are not working. Filer can see their file stamped copy via their Accepted folder, court user can use the "OFS Website – Filing Search" access to envelope details or Odyssey.
6. **Envelope Display.** All parts of the screen must load before the envelope can be worked
7. **Manual Case Number.** On initial filings the field to enter a manual case number is displayed on the Accept Comments fly out window and should not be there
8. **Personally Identifying Information.** The fields for PII in HTML5 do not match the fields in the Review Tool.
9. **Print.** Cannot print the document from the Review Tool – users must go to the waffle icon to select "OFS Website – Filing Search" to access the envelope details and open the "Court Copy" to view or print the file stamped version
10. **Reject = Return.** The language throughout F&S is inconsistent and should be "Return"
11. **Review Queue Display.** Review Queue columns are not expandable
12. **Service Contact Display.** The email of the service contacts is not displayed in the Serve breadcrumb area or the envelope details

- 13. Service Contacts Display.** The Service Contact section of the envelope details has not been developed yet (use the HTML5 filing search option from #5 in the green section above)
- 14. Stamps.** Image stamps that are resized or repositioned do not hold their new orientation or size
- 15. Stamps.** Text stamps land in the center of the document instead of where your cursor is (this is working as designed by Tyler)

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