

Processing Cases in SessionDirect

I. Before You get Started with SessionDirect

A. What is SessionDirect?

- SessionDirect is a separate processing environment that enables court personnel to select existing events in Contexte and process them quickly and efficiently while in the courtroom or after court.
- After processing events and dispositions, SessionDirect passes the data back to Contexte.

B. Tips and Tricks

1. Only cases with open events can be pulled into SessionDirect.
2. Cases must be loaded into and released from SessionDirect.
3. You can query for cases to be heard on a particular day of court.
4. When multiple violations exist on a case, each violation will display as a separate record.
5. SessionDirect does not contain a Navigation Frame.
6. The Navigation Frame features and forms are available by choosing the Options dropdown Menu.
7. The Options dropdown list changes depending on the field the cursor is located.
8. Click the Process checkbox beside multiple records to change or add data to multiple records simultaneously.

II. Loading Cases into SessionDirect

A. Loading Cases

1. Go to NMAMAIN.

2. Enter or select the information for the type of cases you want to load into SessionDirect for processing. (Not all fields are required: See the table below for descriptions of each field).

Case ID:	Enter a Case ID if you want to work with a single case.
Court Code:	Enter your Court Code to limit the number of returned cases.
Location Code:	Enter your Location Code, if your court has multiple locations, to narrow down the number of cases returned.
Case Type Code:	Enter Case Type if needed to narrow down the number of returned cases.
Event Location:	Enter the Location Code where the event is being held.
Room:	Enter a Room if you have multiple courtrooms.
Event:	Enter an Event, if you want to process cases of a specific event type such as HT10 for Trial.
Judge ID:	Enter a Judge ID if you have multiple judges and wish to return cases for a specific Judge.
Date:	Enter a Date if you want to process multiple case for a particular day of court.
Time:	Enter the Time in military format if you only want to process cases at a specific hearing time.

HINT: Notice three violation options at the bottom of the main NMAMAIN window. They are not used for Civil/Small Claims cases.

3. Click **Load from CMS** to import cases into SessionDirect.

HINT: Notice that the Auto-hint line will display the “number event(s) imported into SessionDirect.”

4. Click **Process Selected Cases** to see results display in SessionDirect.

B. Sorting and Working with Cases

HINT: Choose **Options** on the **Menu Bar** for additional column views.

1. Click the **Sort Events** By “LOV button” to sort cases by either Case ID, Defendant’s last name, Process Date, or Event Date/Time.

HINT: To work with **one** case at a time in your SessionDirect list:

- a. Press **F7** to switch to query mode.
- b. Enter the **Case ID** for the case you wish to process.
- c. Press **F8** to display the case.
- d. If you want to see the full list of cases again, press **F7**. Then press **F8** to display the full list of cases.

III. Processing Cases

A. Adding Parties

1. Click the **Proc(ess)** checkbox beside the case for which you wish to add a party.
2. Choose **Options > Add Parties** from the dropdown Menu bar.
3. Press **F6** to insert a blank record.
4. Enter or select the **Party Type**.
5. Enter the **Party ID**.

HINT: If you need to search for the Party ID, click the **Party ID** LOV button. Click on Legal Category (CPILCAT) to search for an attorney. Click on Person (CPIIDEN) to search for a person or an organization.

HINT: Once you have entered or selected a party, you can choose the appropriate button to indicate whether the party is being added to the case or to the event.

6. Press **F10** to save.
7. Click the **X** on the small Add Parties window to close it.

HINT: Press **Ctrl** and **PgDn** to display **Violation** Details box.

B. Adding Docket Codes

1. Choose the **Docket** Tab to display results.

HINT: If **Docket** tab is pre-selected, click in any white space to display results.

2. Press **F6** to insert a new record.
3. Enter or select a Docket code from the **Docket** LOV button.

HINT: AC docket codes are reserved for the Supreme Court and Court of Appeals.

- The Date and Time will default to current date and time, but it can be changed, if needed.
 - Docket Text can also be added, if needed.
4. Press **F10** to save the docket entry.

C. Adding Judgment

HINT: If you are entering a Judgment docket code you must F10 to save then you can click the **Jgmt** LOV button (far right) beside the appropriate docket code to access the Judgment Detail window. Fill in the judgment information.

1. Press **Ctrl** and **PgDn** to go to the next tab.
2. Enter the **Judgment Amount**.
3. In Judgment Text, type in Judgment for P (Plaintiff) or **Judgment** for D (Defendant).
4. Click the **Joint & Several** checkbox, if applicable.
5. Press **Ctrl** and **PgDn** to go to the For/Recipient block.
6. Click the **ID** LOV button, and go to CDAPRTY for a list of parties on the case.
7. Double-click the party who the judgment is for, and this will take you to CDQJMTD.
8. Enter the judgment **Amount** being awarded to the recipient.
9. Press **Ctrl** and **PgDn** to go to the Against block.
10. Click the **ID** LOV button, and the **Select Multiple Parties** pop up box will display on your screen.
11. Click the **checkbox** by each party who the judgment is against.
12. Click the small black **X** on the Multiple Parties window to go back to CDQJMTD.

13. Press **F10** to save.
14. Press **Ctrl** and **PgDn** to go to the Assessment block.
15. Enter the **Assessment Type**. (free text field)
16. Enter the assessment **Amount**.
17. Press **F10** to save.

D. Adding Event Docket Codes

HINT: Closing-docket codes can be entered in SessionDirect to indicate that a hearing has been held, cancelled or continued.

1. Click on the **Docket** Tab.
2. In a blank record, enter or select an event docket code.

HINT: The Date and Time will default, but it can be changed, if needed.

HINT: Docket Text can also be added, if needed.

3. Press **F10** to save the docket entry.

E. Scheduling Events

1. Click on the **Event** Tab to schedule a hearing for a future date.
2. Click on or press **F6** for blank record.
3. Enter the event code or click on the **Event** LOV button to select an event.
4. Enter the **Date** and **Time** for the scheduled event.

HINT: Judge ID, Room, Location and Priority will default.

5. Enter **Event Text**, if needed.
6. Press **F10** to save.

F. Creating Documents

1. Click the **Proc(ess)** checkbox beside all cases for which you wish to create a document.
2. Choose **Options > Letter Merge (CLALMRG)** from the dropdown Menu bar.

3. Enter the **Letter Code** for desired document (EX: EVENT_SCHED_NOT).
4. Press **Ctrl** and **PgDn** to see a list of the cases you selected.
5. Click on **Merge Now** in the Navigation Frame.

HINT: During this process, you may see multiple popup windows. The document will open in Microsoft Word, and it might hide behind other windows. Multiple documents can be printed at one time.

6. Verify that all information is correct on the document you created, and then Print the document.
7. Click on the appropriate response in the Contexte dialog box.

IV. Processing Cases with Violations

A. Adding a Plea and Disposition

HINT: To select **all** cases and all violations to be disposed at one time, go to **Options** on the menu bar and click **Select All**.

1. Select the **Proc(ess)** checkbox beside the case with the violation you wish to dispose.
2. Click the appropriate Plea and Disposition radio buttons.

HINT: Choosing **Other** will display a LOV button that includes other plea and disposition options.

3. Press **F10** to save.

B. Adding Sentence Information

HINT: The **Sentence** Tab will not be available if the disposition is Dismissed or Not Guilty.

1. Press **Ctrl** and **PgDn** to go to the **Sentence** Tab.
2. Enter or select the **Sentence** code.
3. Enter the **Length** of sentence.
4. Select a **Unit** of Hours, Days, Months, or Years.
5. Enter **Sentence Text**, if desired.

C. Adding Conditions

HINT: Driver's license suspensions, revocations, and reinstatements are transmitted to Driver Services automatically.

1. Click on the **Conditions** Tab.
2. Enter or select the **Condition Code**.
3. Enter the **Ordered Date**.

HINT: By entering the **SUS** and the completion date at the same time, the reinstatement record will be sent to Driver's Services.

HINT: Enter the **Condition Charge** and the **Underlying Charge** when entering a Driver's License suspension.

D. Adding Programs

1. Click on the **Programs** Tab.
2. Enter or select the **Program ID**.
3. Enter or search for the **Agency ID**, if the program is a state-run facility.
4. Enter the **Ordered Date** of the condition.
5. A start date, due date, end date and release date can be entered as needed.

E. Adding Fees

HINT: Selecting a Dismissed or Not Guilty disposition will zero out the costs and fines on the Fee Tab when saved.

1. Click on the **Fee** Tab.
2. Review for accuracy, and enter any adjustments needed.

HINT: A pop-up Adjustment Reason message box will display the first time an accounting adjustment is made in SessionDirect.

HINT: Additional accounting changes in SessionDirect will save with the same reason code. **Choose Options > Adjustment Reason** from the dropdown Menu bar to select a different reason code.

F. Bond Information

1. Click on the **Bond** Tab to view any bonds that may have been posted to the case.

G. Creating a Payment Plan

1. Click the **Proc(ess)** checkbox beside the case for which you wish to add a pay plan.
2. Click on the **Create Pay Plan** tab.
3. Enter or Select **Plan Owner ID (CPIIDEN)**.

HINT: After entering a **Plan Owner ID**, you will receive an alert if there are existing payment plans: The owner has one or more existing payment plans. Do you wish to create another plan for this owner? New plan number will auto generate, notice pay plan number.

4. Enter **Effective Date**.
5. Enter **Pay Period**.
6. Enter **Pay Amount**.
7. Press **F10** to save.
8. Choose **Options > Periodic Fee** from the tool bar.
9. Enter **Case Number**.
10. Enter **Detail Code** LOV button, and select the appropriate Time Pay Installment fee type from the list. TPIF is \$5.00 and TPI2 is \$10.00.

HINT: Fee amount will automatically populate.

11. Verify the **Fee Amount** is correct. This is the amount of the periodic fee to be assessed on a monthly basis.
12. Enter **FEEA** as the Reason Code.
13. Enter the **Day of Month** the fee is to be assessed each month.

HINT: Time Payment Plan Fees should be assessed on the 1st day of the month.

14. Enter in the Begin Date of the periodic fee assessment.
15. Check the **Zero Plan Balance** box.

HINT: Checking the Zero Plan Balance checkbox means that the periodic fee will no longer assess once the payment plan balance reaches zero.

HINT: If entering a fee for a specified time period (End Date) DO NOT check the Zero Balance box.

16. Press **F10** to save.
17. Click the **X** on the Periodic Fee Window.
18. Press **F10** to save.

H. Adding a Violation

1. Click on the Case **ID** to which you want to add a violation.
2. Press **F6** to add a violation on a case.
3. Complete the Violation Details window.
4. Be sure to leave the **Auto Calculate Bail** checkbox selected.
5. Area Code and Agency Code will default to match the settings from the violation above the insert.
6. Verify these fields are correct for the added violation.
7. Click **OK**.

I. Changing a Violation Code

1. Click the **Proc(ess)** checkbox beside the violation you wish to change.
2. Click the **Vio** LOV Button to select the corrected Violation code.
3. Press **F10** to save.
4. Enter a **Change Reason** in the Change/Delete Reason pop-up box.

HINT: If a Change Reason box does not appear, choose **Options > Change/Delete Reason** from the dropdown Menu bar to select a different reason, if needed.

5. Press the **Close** button.

J. Changing a Violation Date or Violation Level

1. Click the **Proc(ess)** checkbox beside the violation that needs to be changed.
2. Choose **Options > Violation** Details from the dropdown Menu bar.

HINT: The Violation Details window will appear.

3. Change the Violation Date or Violation Level, as needed.
4. Click OK.

K. Release from SessionDirect

HINT: Once you are done working with the cases, you must release them from SessionDirect, so that the data can be passed back to Contexte.

1. Click the **Proc(ess)** checkbox for all violations on that case.

HINT: Choose **Options > Select All** to place a check beside every case.

2. Choose **Options > Release** from SessionDirect from the dropdown Menu bar to send the case out of the separate SessionDirect environment and back to Contexte.

HINT: An alert box will display asking if you wish to continue.

3. Click **Yes**.

V. Processing Failure to Appear Violations

A. Adding an FTA Violation

HINT: After all cases have been adjudicated or continued to another date in SessionDirect, then the only remaining cases will be Failure to Appear (FTA) Warrants.

1. Click the Proc(ess) checkbox beside the cases for which you wish to add an FTA violation.

HINT: Be sure that you are only selecting the checkboxes beside the records that have the exact same charge level as the level of the FTA you are adding.

2. Press **F6** to insert a new violation.

HINT: Bold fields in new window are required.

3. Enter the **Violation Date**.

HINT: The Violation Date is the Court Date in which the person failed to appear.

4. Click the **Violation ID** LOV button to search for the FTA violation.

HINT: Search for **5-54-120%** to display a list of all FTA violation codes.

5. Double-click the appropriate violation.

HINT: Other fields will auto-populate after the appropriate FTA charge is selected.

6. Enter the **Agency Code** and the **Area Code**.

HINT: Make sure that the **Auto Calculate Bail** checkbox remains checked so that the warrant fees will calculate automatically.

7. Enter the **Service Document** Code (SF10-FTA Warrant).
8. Enter the **Bond Amount** and any **Bond Text** if needed.
9. Click **OK** to save the violation.

HINT: The new charge will display as a new line in the top block of SessionDirect.

10. Before printing the warrant, select the FTA record with a check box beside it.
11. In the Tool bar, click on **Options**.
12. Click on **Print Docs (CCRDBAT)**. If, necessary select printer.
13. Click **PRINT**
14. In the Tool bar, click on **Options**.
15. Click on **Letter Merge (CLALMRG)**.
16. In the Letter Code box, type **SF10**.
17. Press **Ctrl** and **PgDn**.

HINT: Cases listed will have a warrant created.

18. Click Merge Now in the Navigation Frame.

HINT: The document will open in Microsoft Word, and it might hide behind other windows. Verify data before printing. Multiple warrants can be printed at one time.

B. CCADREQ - Creating the FTA Warrant Outside of SessionDirect in Contexte

1. Click the **Proc(ess)** checkbox beside the cases for which you wish to add an FTA warrant.
2. Choose **File > Direct Access** from the dropdown menu bar.
3. Type **CCADREQ** in the Direct Access box.

4. Enter the **Case ID** for which you wish to create a warrant.
5. Enter **SF10** in the Document Code field.
6. Click the **Person ID** LOV button and go to **CDAPRTY** to display a list of parties.
7. Double-click on the Defendant record to go back to **CCADREQ**.

HINT: The Cash Bond field defaults but can be changed if needed.

8. Enter the **Produced Date**.
9. Press the **Tab** key twice, and the Signed Date and Due Date will default.
10. Press **F10** to save.

HINT: Click the Clear Form icon and repeat steps 4-10 for additional warrants.

C. CLALMRG - Generating the Warrant Document

11. While still in CCADREQ, click on **Letter (CLALMRG)** in the Navigation Frame.
12. Enter **SF10** in the Letter Code field.
13. Press **Ctrl** and **PgDn** to display the list of warrants that you recently created in CCAQREQ.
14. Click on **Merge Now** in the Navigation Frame.

HINT: The document will open in Microsoft Word, and it might hide behind other windows. Verify data before printing. Multiple warrants can be printed at one time.