

# OCA Reporting- Requirements, Best Practices for Better Reporting

- **Agenda-**

  - OCA Reporting - Over 1 million, Performance Measures & Monthly Reporting

  - Roles & Responsibilities as to State Reporting

  - [Clearance Rate Defined](#) & Report Updates

  - Age of Active Pending cases and Age of Disposed Cases

  - Inactive vs. Disposed ([Sample Orders](#))

  - Additional Updates and Information

- **Legislation Updates** (SB 293 & language for the Omnibus bill related to Probate and Guardianship Cases)

- **Over 1 million - Reporting Requirements:**

  - <https://www.txcourts.gov/reporting-to-oca/district-county-court-level-reporting>

  - Section 71.035(a) of the Texas Government Code, (added by HB 1182, 88th Legislature, Regular Session) requires counties with a population of at least one million to include additional information in their monthly reports for each district and county court in the county.

  - The reports must include:

1. The number of cases assigned to the court;
2. The case clearance rate for the court;
3. The number of cases disposed by the court;
4. The number of jury panels empaneled for the court;
5. The number of orders of continuance for an attorney before the court or by the court;
6. The number of pleas accepted by the court;
7. The number of cases tried by the judge of the court or before a jury; and
8. The number of cases tried before a visiting or associate judge of the court.

- **[Performance Measures Reporting](#) (Roles and Guidance)**

  - Judge/Court
  - Clerk
  - Court Administrator/Coordinators
  - Administrative Judicial Region Presiding Judge
  - Vendor/IT

- OCA & Data Coordinator
- **Dashboard Demonstration**  
[District and County Court Performance Measures Dashboard | Tableau Public](#)

- **Clearance Rate for Performance Measures**

$$\frac{\text{Disposed + Inactivated + Transferred Out}}{\text{Added + Reactivated + Transferred In}} = \text{Clearance Rate \%}$$

- **Performance Measures Report Updates**
  - Full Fiscal Year from September 1, 2024 – August 31, 2025
  - Report due by Nov. 1, 2025
  - Additional emphases will be made on gathering data for Age of Active and Age of Disposed cases which will include all cases that are included in the Active Pending case data.
- **Inventory and Review Recommendations**
  - Ensure Monthly reporting instructions are being followed.
  - Review Active Pending Cases to validate and make corrections.
  - Proper reporting of Cases filed, Reopened and Disposed.
  - Additional Court Activity reporting requirements.
  - Utilizing Inactive and Reactivated case triggers.
- **Inactive for OCA Reporting**
  - A pending case should be counted as Inactive when further court proceedings and activities cannot resume due to events beyond the court's control.
  - Although many filings can trigger a clerk to set a case Inactive, there are some events that do not generate a document, so unless a document/memorandum is communicated to the clerk, they would not be aware that a case qualifies to be set inactive.
  - Solution- Create a document that provides the clerk the qualifying information to set the case inactive and establish a process for staff to manage the change in status within the CMS.
  - Sample forms have been provided.

- **Pretrial Diversion**
  - PTD's should be reported as a disposition and not just set Inactive when a defendant is placed on a PTD contract.
- **Other Civil Information**
  - Unserved Citations do not qualify as a reason to inactivate the case
  - Tax cases can be disposed if the respondents have entered into a contract with the taxing attorney to make payments of back taxes. If no disposition is entered, it is recommended that at a minimal those cases be set inactive.
  - Eminent domain cases can be disposed upon the appointment of a Special Commissioner and reopened if an "appeal" is made to have the judge review and set for trial, etc.
- **Other Family Information**
  - Unserved Citations do not qualify as a reason to inactivate the case.
  - Child Protective Service Cases should be closed when the parental rights have been terminated, and the court is having Case Review Hearings as required. The hearings are reported in the Additional Court activity section.
- **Updates and Information**
  - Judicial Directory that includes the judge's contact information including email address.
  - Provide the State Commission on Judicial Conduct with access to directory.
  - Please provide a reliable email to [judinfo@txcourts.gov](mailto:judinfo@txcourts.gov).
  - Judicial Transparency - (SB 293, Government Code, Sec. 72.0396)
    - District Judge will report Twice a year (July & January)
      - # of hours presided over court
      - # of hours of judicial duties performed
  - Supreme Court shall adopt rules establishing guidelines and instruction for submission.
  - OCA: Produce Annual report, provide administrative support for submission and collection of information.