



**July 8, 2021**

**To: Public Defense Partners**

**From: Kimber Sexton, Senior Policy Analyst**

**Re: Appeal Caseload Reporting for Non-PCRCP**

As you know, OPDS implemented a new submission platform for caseload reporting for Non-PCRCP attorneys in January 2021. The online submission form has created a central point of submission with automated validation of the report to ensure consistent report format and data. It has also enabled the data to automatically populate a database, enabling OPDS to collect, analyze and report data in a meaningful way. We are now implementing this reporting platform for appeal cases.

We delayed the use of the form for appeal reporting as we navigated the differences in what was necessary to report between adult criminal, non-PCRCP juvenile, and appeals. We are excited to implement this final phase of non-PCRCP caseload reporting.

We have customized the required information for the "Appeal" case type. When submitting reports using the required .csv format, we have made the "Most Serious Charge," "Most Serious Incident Date" and "ORS" optional, in addition to the "Attorney Name" and "Complex Case" columns for all other case types.

All appeal cases must be reported with the "Appeal" case type in the "Most Serious Case Type" and MUST have "County" (for the underlying case), "Client Last Name", "Client First Name", "Case Number" (of the appeal), "Appointment Date", "Assigned Attorney OSB" and the underlying trial court case type (MHMI, CVPC, JDEP, etc.) and case number in the "Comment" column completed in the csv file.

Example:

County	Client Last Name	Client First Name	Case Number	Most Serious Case Type	Most Serious Charge	Most Serious Incident Date	ORS	Appointment Date	Assigned Attorney OSB	Attorney Last Name	Attorney First Name	Complex Case	Comments
Required	Required	Required	Required	Required	Optional	Optional	Optional	Required	Required	Optional	Optional	Optional	Required - Trial Case Number

Caseload reporting is due monthly on the 20<sup>th</sup> of the month following the reporting period (1<sup>st</sup>-31<sup>st</sup> of the previous month). The report should contain all cases that were open during the reporting period. The first submission will be due July 20, 2021 for the June reporting period.

Please attach the file with the case detail to the online form. The file attached will need to be submitted as a Comma delimited .csv file. Reporting will no longer be accepted via email.

**Oregon Office of Public Defense Services**

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1. Once your Excel document is ready, click "Save As," name the file, then choose Comma delimited (\*.csv) from the drop-down menu for file type, click "Save," and choose a local location for storage.
2. Next you will go to: <https://www.oregon.gov/opds/provider/Pages/case-load.aspx> Click on the link for the submittal form, enter submitter information, attach your .csv file, and click submit.
3. You will receive an email, generally within one hour, either confirming your successful submission or one that indicates there are errors. If you receive an error email, it will indicate what row the error is in and what type of error exists, in order to assist you in corrections. If you need assistance please forward that email to [Case.Load.Reporting@opds.state.or.us](mailto:Case.Load.Reporting@opds.state.or.us) and detailing any questions you have.

The system will validate the .csv file to ensure that the required columns, format and information are included. A template .csv file is also available to download from our [website](#).

If you have any questions or need assistance, please send an email to [Case.Load.Reporting@opds.state.or.us](mailto:Case.Load.Reporting@opds.state.or.us), and we will be happy to assist you.