



Law Clinic Reporting Manual

December 2025 Edition

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Introduction

The Oregon Public Defense Commission (OPDC) provides guidance in this manual for contract administrators and/or other reporting counsel from the colleges and universities who contract with OPDC to provide indigent defense services to clients in the State of Oregon. This manual contains guidance and best practices for entering caseload data into the semester reports that are submitted to OPDC. These reports assist OPDC in better understanding the caseloads of law students providing indigent defense services.

The purpose of this manual is to increase the accuracy and consistency of data provided to OPDC, ensure compliance with contracts, and provide reports to stakeholders.

Statutory Authority

ORS 151.216(1)(f); 151.219(1)(b).

Contractual Obligation

Colleges and universities who contract with OPDC to provide defense services are obligated to provide caseload reports, financial reports, end of year reports and voluntary student demographic reports to OPDC.

Caseload reports are necessary for the agency to monitor compliance as stated in contract. Caseload reports are intended to capture law students open caseload for the semester reported. The Law Clinic is obligated to report a case in a reporting semester if law student was assigned to the case for any portion of that semester. For most cases, Law Clinic's obligation to report a case begins when a student is assigned. Law Clinics obligation to report ends depending on the case type, as detailed further below. It is possible for multiple law students to be assigned to the same case in the same reporting semester.

Financial reports are to be submitted to OPDC's Contract Administrator as listed in Exhibit E on the contract per semester, no longer than 30 calendar days from the first day of classes of the subsequent semester.

End of year reports are intended to capture information regarding recruitment, retention, and capacity of public defense services in counties with a high number of unrepresented individuals. Reports are due at the end of the final semester, no longer than 30 calendar days from the first day of classes of the subsequent semester.

Voluntary student demographic reports are intended to capture current diversity of law students that may be entering into public defense. Reports are requested per student per semester, no longer than 30 calendar days from the first day of classes of the subsequent semester.

For Adult Criminal cases,

Law Clinic may close the case when:

1. Law Clinic has met all contractual obligations and the final judgement or order is entered into the court register:
 - a. If the appointment was for a probation violation, Law Clinic shall close the Case upon disposition of the probation violation; or
 - b. A judgment of dismissal constitutes a final judgment; or
 - c. A judge has signed an order removing the Law Clinic from the Case; or
 - d. A bench warrant for a client's failure to appear has been active for 180 consecutive days.

2. Law Clinic may not close a Case that has been entered into a deferral, diversion or conditional discharge agreement under the final judgement has been entered into the court register.

Definitions

Caseload: The number of cases assigned.

Contract Administrator: A person (or persons) responsible for administering a contract with OPDC to provide services to persons qualifying for court appointed counsel.

Law student: Is a law student participating in law school's program. Eligible law school students may appear in court pursuant to the Oregon State Bar Rules for Admissions for Attorneys. The law student appearance program portion of the rules are reproduced as Attachment 1 to Exhibit A, Statement of Work.

Statement of Work or SOW: The documents that describe the program to be provided by the law school, including reporting and caseload documentation required.

CSV: A CSV (comma-separated values) file is a text file, generally created in Excel, which allows data to be saved in a table structured format. Files uploaded during the report submission process must be in this file format. CSV files use the file extension ".csv" and can be selected as a file type when saving or exporting from inside an Excel workbook.

Date of Order or Judgment: Whenever referred to in this documentation, the date of an order or judgment is the date that appears on the face of the document itself, regardless of the date listed in the court's Register of Actions indicating when the document was uploaded to OECL.

OPDC: An acronym for Oregon Public Defense Commission, which is the office established to carry out the administrative policies and procedures for the public defense system.

Open Case: A case that Law Clinic is currently obligated to report. See *Contractual Obligation* above.

Reporting Detail File: The .csv file which contains caseload data for the reporting period.

The Reporting Process

Introduction

This manual sets forth the process by which indigent defense Contract Administrators and other reporting Counsel submit data about the services they provide.

The procedure for obtaining and submitting reports and the reporting template are for all Law School contracts.

Reporting is submitted on a per-campus basis, meaning if a contract administrator administers more than one campus they will need to create and submit separate reports for each campus. For instance, if a college or university has two different locations, the contract administrator should create and submit a report for each campus for the reporting period.

Obtaining the Reporting Template

The submission must be in .csv format, with specific columns and exact header names. While the law clinic may create their own .csv file that complies with the heading and formatting requirements below, OPDC has created a csv template to assist in accurately generating compliant .csv files, which is available on the OPDC website: [Oregon Public Defense Commission : Caseload Reporting : Public Defense Providers Information : State of Oregon](#)

On the Caseload Reporting website, click the plus to the right of Reporting for Law School Contracts. Under Resources, click the link for Law Clinic Reporting Template. Template will download and will typically be placed in your C:\Downloads folder. Depending on your browser, you may also be able to open the file from within your browser.

Caseload Reporting for October 2025 to June 2027 Contracts

Contractor caseload reporting is due by the 15th of each month. Please see contract general terms for specifics regarding caseload reports, case activity, disposition, and withdrawal data, other reports, and penalty for late reports.

Reporting for Criminal & Juvenile (Non-PCRP) Contracts



Reporting for PCRP Contracts



Reporting for Law School Contracts (September 2025 - August 2027)



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Steps for submitting Law Clinic caseload reports:

1. Go to the [Submittal Form](#)
2. Complete all sections of the form (Submitter Information, Reporting Period, CSV File Attachment)
3. Click the "Submit" button

If the CSV files were successfully submitted in the correct format, you will receive an email (email address obtained from the 'Submitter Information' on the form) that contains the following message:

"This email is confirmation that the above referenced caseload report has been successfully received."


If the CSV files were NOT successfully submitted, you will receive an email with errors identified.

[Submittal Form](#)

Resources

- [Law Clinic Reporting Manual](#)
- [Law Clinic Reporting Template](#)
 - [CSV Field Requirements](#)
 - [CSV Validation Rules](#)
 - [CSV Troubleshooting Guide](#)
- Reporting Quick Guide: [Criminal](#)
 - [Adult Criminal: Case Types & Dispo Codes](#)
- [End of Semester Report](#)
- [End of Year Report](#)

Downloads

 Law Clinic Reporting Template 12.1.25.csv

[Open file](#)

| | A | B | C | D | E | F | G | H | I | J | K |
|---|--------|------------------|-------------------|-------------|------------------------|---------------|-------------|--------------------------|-------------|------------------|----------|
| 1 | County | Client Last Name | Client First Name | Case Number | Most Serious Case Type | Assigned Date | Assigned ID | Supervising Attorney OSB | Disposition | Disposition Date | Comments |
| 2 | | | | | | | | | | | |

Filling out a Semester Caseload Report

The user should list each case subject to their reporting obligation on a separate row of the .csv or template. As noted above, the reporting obligation for a case generally begins either when law student is assigned and continues until it terminates under one of the circumstances listed in 14.6 Termination of the contract.

The list of fields, their properties, and guidance for accurate selection and entry of data is detailed further in the [Law Clinic Report Fields](#) section of this manual below.

Example of a completed law clinic caseload report:

| County | Client Last Name | Client First Name | Case Number | Most Serious Case Type | Assigned Date | Assigned ID | Supervising Attorney OSB | Disposition | Disposition Date | Comments |
|--------|------------------|-------------------|-------------|------------------------|---------------|-------------|--------------------------|-------------|------------------|----------|
| Marion | Body | Some | 25CR123456 | MISS | 12/1/2025 | W11111 | 123456 | | | |
| Marion | Doe | Jane | 25CR123457 | DUI | 10/15/2025 | W11112 | 123456 | DIVR | 11/1/2025 | |
| Marion | Doe | John | 25CR123458 | MPV | 11/1/2025 | W11112 | 123456 | | | |

Saving a Semester Caseload Report

Once the data for the reporting semester has been entered, the user should perform the following:

1. File, Save As
2. Navigate to the location where the completed CSV is to be saved
3. Use the following naming convention, "[Law School] Caseload Reporting_[Semester] [Year]" ie. Willamette Caseload Reporting_Fall 2025.
Note: the use of special characters in the file name will result in an error.
4. Use this file to upload for Caseload Reporting

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Submitting the Semester Caseload Report

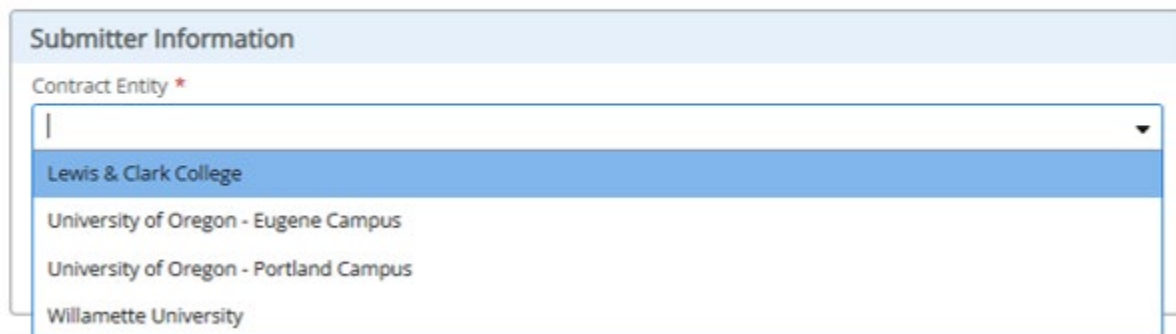
Caseload reporting is submitted via an online form available on the OPDC website at [Oregon Public Defense Commission : Caseload Reporting : Public Defense Providers Information : State of Oregon](#) to which the caseload detail file is attached in .csv format.

Caseload reporting is due 30 calendar days from the first day of classes of the subsequent semester.

When reporting, Contract Administrator should first select their entity and contract type in the Submitter Information section:

Type of Submission *

☐ Criminal/Juvenile (non PCR) ☐ PCR ☒ Public Defense Law Clinic



Submitter Information

Contract Entity *

Lewis & Clark College

University of Oregon - Eugene Campus

University of Oregon - Portland Campus

Willamette University

If your contract entity does not appear in the drop-down list for submission, please reach out to lawclinic.reporting@opdc.state.or.us to let us know.

Enter the email address in the Submitter's Email field where you want the email notification to be sent.

Submitter's Email *

lawschool@gmail.com

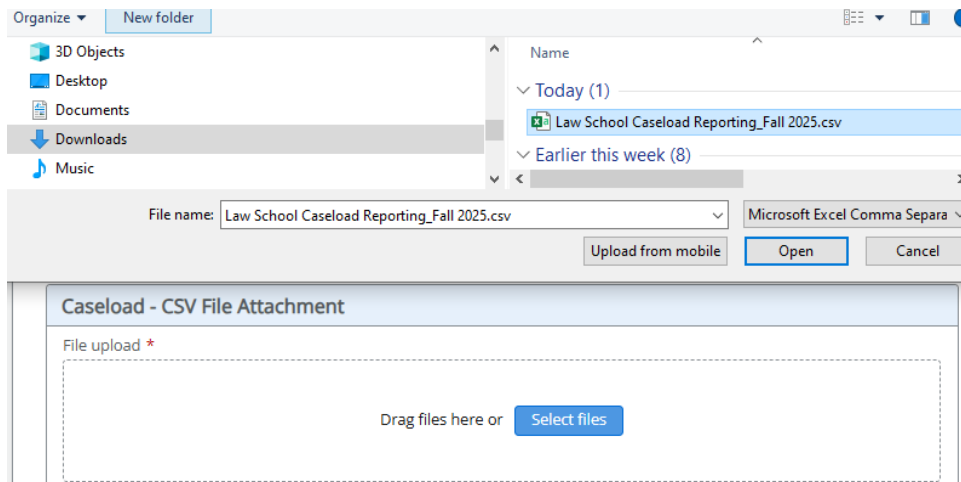
Reporting Period, Select the Semester and Year you are reporting.

Semester * Year *

Fall ☐ 2023 ☐ 2024 ☒ 2025

Caseload – CSV File Attachment, Click on Select Files. Browse to location of saved csv for semester and year reported, Open, Submit.

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Validating the Report

When the submission is received the system will validate that:

1. The file is .csv
2. All expected columns are present and in the required order
3. Column headers match the required headers below
4. All columns with required information contain data. Any blank cell in a required column will result in a failed submission
5. Assigned ID and Oregon State Bar number for supervising attorney reported are active in OPDC database
6. Case types reported are from the acceptable OPDC list
7. Disposition Codes entered are from the acceptable OPDC list
8. Date format is MM/DD/YYYY
9. Assigned Date is not before 1/1/2024 and not in the future
10. If a Disposition Code is entered, a Disposition Date is also entered
11. If a Disposition Date is entered is not before 1/1/2024 and not in the future

Additional detail regarding the csv validation can be found on OPDC website at [Oregon Public Defense Commission : Caseload Reporting : Public Defense Providers Information : State of Oregon](#) Reporting for Law School Contract, Resources, CSV Validation Rules.

Following is the list of Column Headers, their format, and whether they are required for validation. This list can also be found on the OPDC website at [Oregon Public Defense Commission : Caseload Reporting : Public Defense Providers Information : State of Oregon](#), Reporting for Law School Contract, Resources, CSV Field Requirements.

| Column Header | Data required for valid submission | Format |
|-------------------|------------------------------------|--------|
| County | Required | Text |
| Client Last Name | Required | Text |
| Client First Name | Required | Text |

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| Column Header | Data required for valid submission | Format |
|--------------------------|---|------------|
| Case Number | Required | Text |
| Most Serious Case Type | Required | Text |
| Assigned Date | Required | MM/DD/YYYY |
| Assigned ID | Required | Text |
| Supervising Attorney OSB | Required | Text |
| Disposition | Optional, required if Disposition Date is populated | Text |
| Disposition Date | Optional, required if Disposition is populated | MM/DD/YYYY |
| Comments | Optional | Text |

If the caseload report passes validation, an email is generated by the system and automatically sent to the email address entered during submission with the following:

Dear Public Defense Partner,

This email is confirmation that the above referenced Law Clinic Caseload report has been successfully received. ANY previous submission for same semester and year is now overwritten.

If OPDC determines that a submitted report does not meet the requirements set forth in the contract, OPDC will notify Law Clinic within fifteen (15) Business Days of receipt. Law Clinic shall have up to fifteen (15) Calendar Days from notification to correct and successfully resubmit the report. If the corrected report is not submitted by the deadline, OPDC may pursue remedies provided by law or terms of the Contract.

If a report fails the review, the automated email will contain information about why the report did not pass review:

Dear Public Defense Partner,

The following error was found in a CSV attachment for the Caseload reporting submitted. Please correct the attached file and **resubmit within two business days.**

There was an error with the information submitted in your CSV(s).

Public Defense Law Clinic:

Row 4: Invalid date value in field: Disposition Date. Format must be MM/DD/YYYY and after 1/1/2024. Invalid value: '1/1/0524'

Occasionally, submitting a report does not generate an automatic email receipt. If you have submitted a report and do not receive a response from the automated system, contact OPDC at LawClinic.Reporting@opdc.state.or.us for assistance.

Common Validation Errors

Documentation for troubleshooting common validation errors can be found on OPDC website at [Oregon Public Defense Commission : Caseload Reporting : Public Defense Providers Information : State of Oregon](#), Reporting for Law School Contract, Resources, CSV Troubleshooting Guide.

Law Clinic Report Fields

This section describes each of the fields contained within the Law Clinic Reporting Template, how the user enters data into the field, any data validation restrictions, the purpose of the collected data for that field, whether the field is required or optional, and both general and specific case-type guidance for what data should be entered. Required fields are headed in **red**, while optional fields are headed in **blue**.

County

Description: This field reports the name of the county in which the case is currently being litigated.

Data Entry Type: The user enters the designated county (Marion, Lane and Multnomah are the most typical).

Data Validation: County value must exist. Attempting to enter a value outside of the accepted counties will result in an error message.

Purpose: Modeling caseload distribution.

General Guidance: For most cases, this value will be one of the counties in which the law student practices: Marion, Lane, or Multnomah.

Client Last Name

Description: This field reports the last name of the client the law student represents.

Data Entry Type: The user enters a text value into the field.

Data Validation: A text value must exist in this field.

Purpose: Differentiating between represented clients.

General Guidance: Enter the client's last name. Entering multiple last names for a singular client, hyphenated or not, should not cause issues with the reporting template.

Client First Name

Description: This field reports the first name of the client the law student represents.

Data Entry Type: The user enters a text value into the field.

Data Validation: There must be a text value in this field.

Purpose: Differentiating between represented clients.

General Guidance: Entering a client's First name is acceptable and should not cause issues with the reporting template.

Case Number

Description: This field reports the case number assigned to the case by the Oregon Judicial Department.

Data Entry Type: The user enters a text value into the field.

Data Validation: There must be a text value in this field. Case number should be no longer than 15 characters and should not contain spaces or special characters.

Purpose: Ability to track assigned cases.

General Guidance: This is the case number of the case currently being worked by the law student appointed to the case.

Most Serious Case Type

Description: This field reports the most serious case type charged in the charging document among the case classifications determined by OPDC.

Data Entry Type: The user enters a text value from list of acceptable case type codes. Case type codes can be found on the OPDC website at [Oregon Public Defense Commission : Caseload Reporting : Public Defense Providers Information : State of Oregon](#) Reporting for Law School Contract, Resources, Adult Criminal: Case Types & Dispo Codes, Page 1

Data Validation: There must be a value in this field, and it must match one of the options listed.

Purpose: Evaluating caseloads by case type. Evaluating caseloads in specialty courts.

General Guidance: Enter the case type the most serious charge falls into. The case should always be reported as the highest charge within the semester. If an amended charge occurs in the following semester and the student is still assigned to the case, correct the case type to the current highest charge.

Assigned Date

Description: This field reports the date the law student was assigned to provide indigent defense services to the client for this case.

Data Entry Type: The user enters a date value in MM/DD/YYYY format into the field. Date cannot be before 1/1/2024 and not in future.

Data Validation: There must be a date value in this field.

Purpose: Evaluating appointed caseload.

General Guidance: Enter the date law student was assigned to the case. If law student is reassigned or substituted, both law students should be entered into the report, one with a disposition code and date for withdrawal and one as a new assigned date. For the law student receiving the case, the Assigned Date is the date of reassignment.

Assigned ID

Description: This field reports the unique assigned ID number received from OPDC that law students have been assigned by their respective law clinic.

Data Entry Type: The user enters text and/or numbers into the field.

Data Validation: Text in field must match to assigned ID. Assigned ID must exist in OPDC Attorney database.

Purpose: Improves efficiency in identifying the appointed law student for identified cases.

General Guidance: Enter the assigned ID numbers for law students who are assigned a case by their respective law clinic.

Supervising Attorney OSB

Description: This field reports the Oregon State Bar license number of the attorney appointed to supervise the law student selected to represent the identified client in the identified case.

Data Entry Type: The user enters a number value into the field.

Data Validation: There must be a six-digit value in this field. Supervising Attorney OSB must exist in OPDC Attorney database.

Purpose: Evaluating which law students are supervised by which attorneys.

General Guidance: Enter the Oregon State Bar Number of the attorney supervising the law student assigned to handle the case.

Disposition

Description: This field reports the disposition of the identified case once disposition occurs.

Data Entry Type: The user enters a text value from list of acceptable disposition codes. Disposition codes can be found on the OPDC website at [Oregon Public Defense Commission : Caseload Reporting : Public Defense Providers Information : State of Oregon](#), Reporting for Law School Contract, Resources, Adult Criminal: Case Types & Dispo Codes on Page 2

Data Validation: Attempting to enter a value outside of the acceptable list will result in an error message. Blank value will assume disposition has not occurred. If a disposition date is entered, a disposition code is required.

Purpose: Evaluating case outcomes.

General Guidance: A disposition code is required in which circumstances that are described by a disposition code occur. Enter the disposition code that most accurately reflects the event that occurred. If an event occurs that results in the termination of law student representation of the client, a disposition code should be entered reflecting that event.

Specific Guidance:

For cases that result in a bench warrant for the client: continue to report the case for 180 days following the issuance of the warrant then, in the next report cycle at the end of the 180 days, enter the disposition code WTBN.

For cases entering diversion or specialty court: disposition occurs on the date that the client enters those programs.

*If a Disposition Code of OTHR or OTPA is entered, a comment should be entered in the "Comments" field explaining the nature of the disposition.

Disposition Date

Description: This field reports the date of disposition of the identified case.

Data Entry Type: The user enters a date value into the field using the following date format: MM/DD/YYYY.

Data Validation: If a date is entered, value must be in date format. Blank value will assume disposition has not occurred. If a disposition code is entered a disposition date is required. Date cannot be before 1/1/2024 and not in future.

Purpose: Evaluating law student caseload.

General Guidance: A disposition date is required when a disposition is entered in the same row. Enter the date of the order or judgment resulting in the coded disposition, regardless of when that order or judgment is uploaded to the case register of actions.

Comments

Description: This field reports any additional information or commentary the user wishes to provide.

Data Entry Type: The user enters a text value into the field.

Data Validation: This field has no validation restrictions.

Purpose: The purpose of this field is determined by the user.

General Guidance: Guidance for other fields will indicate when entries are required for this field. Additional entries beyond those required by other fields are discretionary.

End of Year Report

Filling out End of Year Report

End of year reporting is submitted via an online form available on the OPDC website at [Oregon Public Defense Commission : Caseload Reporting : Public Defense Providers Information : State of Oregon](#) Reporting for Law School Contract, Resources, End of Year Report.

End of year report is due 30 calendar days from the first day of classes of the subsequent semester.

Fill out form for each campus location. Form contains 13 questions with the first 12 questions required. Answers given for questions 1-12 will be numeric only.

Law Clinic End of Year Report

Hi, Charity. When you submit this form, the owner will see your name and email address.

1. Law School

- ☐ Lewis & Clark College
- ☐ University of Oregon Eugene Campus
- ☐ University of Oregon Portland Campus
- ☐ Willamette University

2. How many students applied for the law school clinic and were accepted?

The value must be a number

3. How many were 2L?

The value must be a number

4. How many were 3L?

The value must be a number

Voluntary Demographic End of Semester Report

Filling out Student Demographic Report

Student demographic report is submitted via an online form available on the OPDC website at [Oregon Public Defense Commission : Caseload Reporting : Public Defense Providers Information : State of Oregon](#) Reporting for Law School Contract, Resources, End of Semester Report

Individual students may fill out the student demographic form. Reports are requested per student per semester, no longer than 30 calendar days from the first day of classes of the subsequent semester.

All questions are optional. Information is anonymous. OPDC will not have the ability to link assigned id to any individual.

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Law Clinic Student Demographics End of Semester Report

When you submit this form, it will not automatically collect your details like name and email address unless you provide it yourself.

Law Clinic Assigned #

Enter your answer

Law School

☐ Lewis & Clark College

☐ University of Oregon Eugene Campus

☐ University of Oregon Portland Campus

☐ Willamette University

Which of the following describes your racial or ethnic identity? Select all that apply

☐ American Indian or Alaska Native (American Indian, Alaska Native, Canadian Inuit, Metis, First Nation, Indigenous Mexican, Central American, or South American)

☐ Asian (Afghan, Asian Indian, Cambodian/Khmer, Chinese, Filipino/a, Hmong, Indonesian, Japanese, Korean, Laotian, Pakistani, South Asian, Taiwanese, Thai, Vietnamese, Other Asian)

☐ Black or African American (African American, Afro-Caribbean, Ethiopian, Haitian, Jamaican, Nigerian, Somali, Other Black)

Resources

All document resources can be found on OPDC website at [Oregon Public Defense Commission : Caseload Reporting : Public Defense Providers Information : State of Oregon](#), Reporting for Law School Contracts, Resources

| Link | Description |
|--|---|
| Law Clinic Reporting Manual | Manual for caseload reports, end of year reports and voluntary student demographic reports |
| Law Clinic Reporting Template | CSV reporting template used for submitting semester caseload reports |
| CSV Field Requirements | Field requirement details for csv reporting template |
| CSV Validation Rules | Validation rules for each field in csv reporting template |
| CSV Troubleshooting Guide | Common errors received after csv report submission with suggested solutions |
| Reporting Quick Guide: Criminal | Acceptable case type and disposition codes used in csv reporting template (color formatted) |
| Adult Criminal: Case Types & Dispo Codes | Acceptable case type and disposition codes used in csv reporting template |

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| | |
|------------------------|---|
| End of Semester Report | Fillable form for voluntary semester demographic data |
| End of Year Report | Fillable form for end of year report questions |