



# Caseload and Workload Reporting Manual

## PCRCP-specific Update

March 2023 Edition

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# Introduction

This short-form manual is intended only as an update to the Reporting Process and Reporting Fields guidance that occurred as a result of the restructured PCRCP Reporting Process implemented in March, 2023. For general reporting guidance and guidance specific to Caseload and Workload Reporting for non-PCRCP contracts, please refer to the Caseload and Workload Reporting Manual, January 2023 Edition.

# The Reporting Process

## The Revised PCRCP Reporting Process

### Obtaining the Reporting Template

Submissions consist of two .csv files and a series of questions that help the data system identify the attorney for whom the submission is being made. While a provider may create their own .csv files that comply with the heading and formatting requirements below, OPDS has created an Excel Template to assist in accurately generating compliant .csv files, which is available on the OPDS website:

<https://www.oregon.gov/opds/provider/Pages/case-load.aspx>

The Template can be found within the expandable menu “Reporting for PCRCP Contracts.” Please ensure you have the correct template, as the template used for reporting for PCRCP contracts is considerably different from the template used for reporting for non-PCRCP contracts and the two are not interchangeable. The correct template will have three sheets in the Excel file: OpenCasesReport, ActivityReport, and DropDowns.

### Filling out the Monthly Reports

As with historical PCRCP reporting practice, there are two “reports” each month, a report of all cases open during any portion of the reporting month and a report of the activities performed on those cases within the month.

In the OpenCasesReport tab 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 appointed by the Court or granted pre-appointment approval by OPDS and continues until it terminates under one of the circumstances listed in General Term 10.3 of the contract.

In the ActivityReport tab the user should list each activity performed on each case and, consistent with guidance for each field of the report, may need to report the same activity multiple times – for instance when a single court activity results in multiple Court Activity Outcomes or impacts multiple siblings of a sibling group.

If using the template provided by OPDS, filling out the fields can be simplified by using the provided drop-down selections for some fields. Those dropdowns only function as information is entered left to right on a per row basis. This is so the template can narrow and display only those options relevant to previous selections.

The list of fields, their properties, and guidance for accurate selection and entry of data is detailed further in the Caseload Report Fields section of this manual below.

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### Saving a Monthly Report

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

1. With the OpenCasesReport tab active, select File -> Save As...
2. Navigate to the location where the CSV is to be saved
3. Enter a name for the CSV file. While there are no technical restrictions on the file name, best practice would be to include the month and year of the report, the name or bar number of the attorney, and a reference to this being the OpenCasesReport
4. Select the "CSV (Comma Delimited)" file type
5. Click the "Save" button
6. You'll get a pop-up dialogue warning about saving in this file type, since it can't support multiple tabs. That's okay, you'll be saving each tab individually. Click "OK" to save the currently open tab as a .csv file.
7. With the ActivityReport tab active, repeat steps 1-6, entering a different file name so as not to overwrite the file saved from the OpenCasesReport

### Submitting the Monthly Report

Caseload reporting is submitted via an online form available on the OPDS website at <https://www.oregon.gov/opds/provider/Pages/case-load.aspx> to which the caseload detail file is attached in .csv format.

Caseload reporting is due monthly on the 20th of the month following the reporting period (Example: 1st-31st of January is due February 20).

Contract Administrators are to submit a separate report of services under contract for each associated counsel performing work on that contract and must contain public defense cases subject to the reporting obligation for that month.

When reporting work under a contract, the person submitting the report should first select their contract entity and enter the OSB number of the attorney for whom the report is being submitted:

Submitter Information	
Contract Entity *	<input type="text"/>
Reporting Attorney Oregon State Bar Number *	<input type="text"/>
Submitter's Email *	<input type="text"/>

If your contract entity does not appear on the drop-down list of options for submission, please reach out to [pcrp.caseload.reports@opds.state.or.us](mailto:pcrp.caseload.reports@opds.state.or.us) to let us know.

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After selecting the contract entity and entering the bar number of the attorney providing services, the user should select the month for which the report is being submitted. For each of the Open Cases and Activity report upload boxes, select the files created in the Saving a Monthly Report step above. If the Contract Administrator or other reporting Counsel has no open cases during a given reporting period, the user should instead check the “No cases to report on for this reporting period” checkbox on the online submission form and need not attach a file.

The caseload detail file must be in .csv format and contain all columns with exact header names shown in the template (available on the OPDS website at <https://www.oregon.gov/opds/provider/Pages/case-load.aspx>).

### 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. Case types reported are from the expected OPDS list
6. Disposition Codes entered are from the expected OPDS list
7. Date format is MM/DD/YYYY
8. Reported Dates are not in the future

Following is the list of Column Headers, their format, and whether they are required for validation:

Open Cases Report		
Column Header	Data required for valid submission	Format
Case Number	Yes	Text
Petition Number	No	Text
County	Yes	Text
Client Last Name	Yes	Text
Client First Name	Yes	Text
Open Date	Yes	MM/DD/YYYY
Case Type	Yes	Text
Additional Case Weight	No	Text
PCRP Case Count	Yes	numeric
Case Manager	No	Yes/No
Status of Youth/Child Placement	No	Text
Closed Date	No	MM/DD/YYYY
Comments	No/as required by policy	Text

Activity Report		
Column Header	Data required for valid submission	Format
Case Number	Yes	Text
Client Last Name	Yes	Text
Client First Name	Yes	Text
Activity	Yes	Text
Activity Date	Yes	MM/DD/YYYY
Hours Spent	Yes	Numeric
Court Activity Outcome	No	Text
Dismissal Reason	No	Text
Comments	No/as required by policy	Text

If the 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 PCRCP caseload report has been successfully received.

Replies to this email address are not monitored.

**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 OPDS at [case.load.reporting@opds.state.or.us](mailto:case.load.reporting@opds.state.or.us) for assistance.**

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

Dear Public Defense Partner,

There were exceptions processing the submitted file(s). Please correct the errors listed below and resubmit. If you have questions or need assistance, please contact your contract analyst.

Note: The row number does not include the header row. Row number one will be the row directly below the header row.



**Exceptions for Open Case Report File named [OCRFILENAME].csv:**

**Exceptions for Open Case Report File named [ARFILENAME].csv:**

If a report fails validation, the user should correct the .csv file and resubmit **within the grace period for reporting**.

Common validation errors

As common validation errors are identified they will be added to this section in further iterations of this manual.

**For other errors, please refer to the guidance specific to the contract type in the Caseload Report Fields section of this manual.**

*Please note that it is technically possible to submit a report that passes validation but does not comply with guidance. If a report deviates significantly from OPDS guidance, OPDS may ask the provider to submit a corrected report.*

Questions:

All communications related to caseload reporting, except for PCRCP caseload, should be sent to [pcrp.caseload.reports@opds.state.or.us](mailto:pcrp.caseload.reports@opds.state.or.us).

# Caseload Report Fields

## Introduction

This section describes each of the fields contained within the Caseload Report 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 Maroon.**

**Optional fields are headed in Teal.**

## PCRCP Contracts

The PCRCP contract report template has three sheets, the Open Case Report sheet the Activity Report sheet, and a sheet containing internal references for drop down menus on the other sheets.

### Contractor Name

**Description:** This field has been removed from PCRCP reporting and is now in the submission form instead.

### Counsel Name

**Description:** This field has been removed from PCRCP reporting.

### Counsel Bar Number

**Description:** This field has been removed from PCRCP reporting and is now in the submission form instead.

### Reporting Year (Open Case Report)

**Description:** This field has been removed from PCRCP reporting and is now in the submission form instead.

### Reporting Month (Open Case Report)

**Description:** This field has been removed from PCRCP reporting and is now in the submission form instead.

### Active Juvenile Case Count (Open Case Report)

**Description:** This field has been removed from PCRCP reporting.

### Active non-Juvenile Case Count (Open Case Report)

**Description:** This field has been removed from PCRCP reporting.

## Case Number (Open Case Report)

**Description:** This field reports the case number assigned to the case by the Judicial Department. In the event the case is in a pre-filing posture, this field instead captures the pre-petition nature of the case.

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

**Purpose:** Evaluating caseload against caseload requirements over the six-month period. Determining when cases may be reported an additional time. Facilitating case type data validation with collateral sources.

**General Guidance:** Enter the case number associated with the client the Counsel represents. If approved for pre-petition representation, enter "Pre-petition."

### **Specific Guidance:**

*For Dependency, Termination, Guardianship, and Contested Adoption cases, when representing a Parent or Guardian:* Enter the case number of the petition filed with respect to the eldest sibling of the sibling group that applies to the named client. For instance, in a Termination case, Father's Counsel should enter the case number of the petition against Father that seeks to terminate Father's rights to the eldest of Father's children for which termination is sought. For an example complex sibling group reporting scenario, see Appendix C.

*For Dependency, Termination, Guardianship, and Contested Adoption cases, when representing child(ren):* Enter the case number of the case specific to the named client. If representing multiple siblings of a sibling group, use a separate row to enter each child. See Appendix C.

*Additionally, for Termination cases when representing child(ren):* For each child, enter only the case number of the termination petition seeking to terminate Mother's rights to that child, if appointment is active on such a case. Otherwise enter the case number of the petition seeking to terminate Father's rights to that child. See Appendix C.

*For Dependency cases, when an additional petition is filed with the same client as a party:* Do not make a separate entry in the Open Case Report, even if the Case Number is different. Instead, double the value in the PCRPs Case Count field and enter a comment in the "Comments" field explaining that a second petition has been filed. See Appendix C.

## Petition Number (Open Case Report)

**Description:** Guidance is under development for this reporting field.

**Data Entry Type:** Guidance is under development for this reporting field.

**Purpose:** Guidance is under development for this reporting field.

**Guidance:** Counsel should not enter anything into this field.

## County (Open Case Report)

**Description:** This field now only appears in the Reporting Table and reports the county in which the case is filed.

**Data Entry Type:** The user selects a value from a drop-down list of options.

**Purpose:** Evaluating current caseloads versus forecasted needs by county. Evaluating ratio of caseload in adjacent jurisdictions. Evaluating case weight for out-of-county representation.

**General Guidance:** Enter the county in which the case is filed.

## Client Last Name (Open Case Report)

**Description:** This field reports the last name of the client the Counsel represents.

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

**Purpose:** Differentiating between multiple clients associated with the same case number.

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

**Specific Guidance:**

*For Dependency, Guardianship, and Termination cases, when representing multiple siblings of a sibling group: use a separate row to enter each child. See Appendix C.*

## Client First Name (Open Case Report)

**Description:** This field reports the first name of the client the Counsel represents.

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

**Purpose:** Differentiating between multiple clients associated with the same case number.

**General Guidance:** Enter only a single client's name. Enter the first name of the client. Entering both a First and Middle name should not cause issues with the reporting template.

**Specific Guidance:**

*For Dependency, Guardianship, and Termination cases, when representing multiple siblings of a sibling group: use a separate row to enter each child. See Appendix C.*

## Open Date (Open Case Report)

**Description:** This field reports the date a case opens for the Counsel providing representation.

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

**Purpose:** Evaluating caseload against forecasted need. Evaluating timing for extraordinary case circumstance requests.

**General Guidance:** Enter the earliest of the following:

- The date of first appearance on the petition
- The date of appointment by the court
- The date OPDS approved pre-petition representation

**Specific Guidance:**

If counsel is reassigned or substituted, both Counsels should enter the case into their report for the month in which that reassignment or substitution occurred. For the Counsel receiving the case, the Appointment Date is the date of reassignment or the date the substitution of counsel is filed.

*For Dependency cases, when an additional petition is filed with the same client as a party:* Do not make a separate entry in the Open Case Report, even if the Case Number is different. Instead, double the value in the PCRCP Case Count field and enter a comment in the “Comments” field explaining that a second petition has been filed. See Appendix C.

## Case Type (Open Case Report)

**Description:** This field reports the type of case for which public defense services are being provided.

**Data Entry Type:** The user selects a value from a drop-down list of options.

**Purpose:** Evaluating current caseload against forecasted need by case type. Evaluating current caseload against Counsel qualification certificates.

**General Guidance:** Enter the Case Type that most accurately captures the case in which the Counsel is providing representation.

**Specific Guidance:**

*For Delinquency cases:* When first counting the case on a caseload report, enter the category of the most serious offense on the Petition. If the court grants a DA’s motion to amend the petition, and that amendment changes the category of the most serious offense, change the entry in this field to match the new most serious offense.

Following is the list of Case Type Codes and guidance on when each should be selected:

Case Type	When to Enter
Delinquency M11 Waiver (M11W)	Delinquency Measure 11-level offense case in which a Waiver motion has been filed
Delinquency Felony Waiver (FW)	Delinquency Felony case in which a Waiver motion has been filed

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<b>Case Type</b>	<b>When to Enter</b>
Delinquency (M11)	Delinquency Measure 11-level offense
Delinquency (F)	Delinquency Felony
Delinquency (M)	Delinquency Misdemeanor
Probation Violation	Delinquency PV or Motion to Modify
Delinquency (Other)	Delinquency case not otherwise specified, including violations
Formal Accountability Agreement	Delinquency case in which the Counsel is providing pre-petition representation on a Formal Accountability Agreement
Delinquency (Pre-Petition)*	Delinquency case in which the Counsel is providing pre-petition representation for a not otherwise specified reason
Dependency (Parent)	Dependency case in which the client is a Parent or Guardian
Dependency (Child)	Dependency case in which the client is a lone child or the eldest member of the sibling group represented by the Counsel
Dependency (Additional Children)	Dependency case in which the client is a non-eldest member of the sibling group represented by the Counsel
Dependency (Pre-petition)*	Dependency case in which the Counsel is providing representation prior to the filing of a petition
TPR (Parent)	Termination case in which the client is a Parent
TPR (Child)	Termination case in which the client is the eldest member of the sibling group represented by the Counsel
TPR (Additional Children)	Termination case in which the client is a non-eldest member of the sibling group represented by the Counsel
Guardianship (Parent)	Guardianship case in which the client is a Parent or Guardian
Guardianship (Child)	Guardianship case in which the client is the eldest member of the sibling group represented by the Counsel
Guardianship (Additional Children)	Guardianship case in which the client is a non-eldest member of the sibling group represented by the Counsel
Guardian Ad Litem	Any juvenile case in which the Counsel is serving as a Guardian Ad Litem for the client
Voluntary Placement Agreement	When Counsel has been appointed to represent a Child in a Voluntary Placement Agreement
Civil Contested Adoption	Civil contested adoption case

\*Requires approval from OPDS

## Additional Case Weight (Open Case Report)

**Description:** This field reports the type of circumstance under which additional case weight has been approved if it has.

**Data Entry Type:** The user selects a value from a drop-down list of options.

**Purpose:** Identifying cases for additional case weighting. Developing and standardizing policy regarding additional case weighting.

**General Guidance:** A value should only be selected in this field if OPDS has already approved additional case weight for the case. Select the value that matches the approval reason from OPDS.

**Specific Guidance:** Following is the list of Additional Case Weight circumstances:

Additional Case Weight	When to Enter
Out of county	Automatically granted when the county of appointment is not in the county of the contract
Approved Extraordinary Case Circumstances*	Must be previously approved by OPDS

## PCRP Case Count (Open Case Report)

**Description:** This field reports the case count value for the case.

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

**Purpose:** Evaluating workload against contractual limits. Evaluating workload fluctuations over time.

**General Guidance:** If approved for Additional Case Weight for Extraordinary Case Circumstances, enter the total case weight approved for the case.

**Specific Guidance:**

*For Delinquency Cases:* For new petitions, enter a value of 1. If the youth is adjudicated and placed on probation, update the value to 0.5 unless the probation is for a sex offense, and continue reporting the case on the Open Case Report.

*For Dependency, Guardianship, and Termination cases, when representing a Parent, Guardian, and only one child from sibling group:* Enter a value of 1 regardless of the number of siblings in the sibling group

*For Dependency, Guardianship, and Termination cases, when representing multiple siblings from a sibling group:* Enter a value of 1 for the eldest child represented from those of the sibling group represented by the Counsel. For each other child of the sibling group represented by the Counsel, enter a value of 0.5. See Appendix C.

*For Dependency cases, regardless of which party is represented:* If an additional petition is filed, for the period of time in which there is a petition that remains pre-jurisdiction, double the entered value. In the month following the month in which



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the additional petition's jurisdiction has been resolved, resume entering the standard value. Following is a summary of case count guidance:

Case Type Code	Pre-Adjudication Base Weight	Post-Adjudication Base Weight
Delinquency M11 Waiver (M11W)	2.0	1.0 for Sex Offenses, otherwise 0.5
Delinquency Felony Waiver (FW)	2.0	1.0 for Sex Offenses, otherwise 0.5
Delinquency (M11)	1.0	1.0 for Sex Offenses, otherwise 0.5
Delinquency (F)	1.0	1.0 for Sex Offenses, otherwise 0.5
Delinquency (M)	1.0	1.0 for Sex Offenses, otherwise 0.5
Probation Violation	1.0	While a PV is pending, update the count to 1.0 regardless of case type.
Delinquency (Other)	1.0	0.5
Formal Accountability Agreements	1.0	N/A
Delinquency (Pre-Petition)	1.0	N/A
Dependency (Parent)	1.0	1.0
Dependency (Child)	1.0	1.0
Dependency (Additional Children)	0.5	0.5
Dependency (Pre-petition)	1.0	1.0
TPR (Parent)	1.0	N/A
TPR (Child)	1.0	N/A
TPR (Additional Children)	0.5	N/A
Guardianship (Parent)	N/A	1.0
Guardianship (Child)	N/A	1.0
Guardianship (Additional Children)	N/A	0.5
Guardian Ad Litem	1.0	1.0
Voluntary Placement Agreements	1.0	1.0
Civil Contested Adoption	1.0	N/A

## Case Manager (Open Case Report)

**Description:** This field reports whether a Case Manager has been assigned to work with the client.

**Data Entry Type:** The user selects a value from a drop-down list of options.

**Purpose:** Evaluating Case Manager utilization ratio.

**General Guidance:** Select Yes if a Case Manager has been assigned to work with the client at any point. Otherwise, select No.

## Status of Youth/Child Placement (Open Case Report)

**Description:** This field reports the type of placement for child clients. **This field is required when representing the child or youth.**

**Data Entry Type:** The user selects a value from a drop-down list of options.

**Purpose:**

**General Guidance:** If a child or youth changes placements within the reporting month, select the value that is true for the last day of the month. If the child or youth's location is unknown or only temporarily hospitalized, enter the most recent placement.

**Specific Guidance:** The following are Statuses of Youth or Child with guidance on when each should be selected based on case type and posture:

Delinquency Cases Pre-Adjudication	
Status of Youth	When to Enter
In home with Parent/Legal Guardian	Youth is on their own recognizance
Conditional Release	Youth is released from detention subject to conditions, community monitoring, or electronic monitoring
Detention	Youth is placed in Detention
Other	Youth is in a placement not otherwise specified. Enter an explanation in the Comments field.

Delinquency Cases Post-Adjudication	
Status of Youth	When to Enter
In home with Parent/Legal Guardian	Youth is placed in home with a Parent or Guardian subject to probation or alternative disposition
Non-relative substitute care	Youth is placed in a kin or non-kin foster home setting
Congregate foster care	Youth is placed in a group home or other agency placement; Youth is placed in an out-of-state residential placement either as a condition of probation or protective supervision; Youth is in a psychiatric facility for long term treatment
OYA Custody	Youth is placed in an OYA correctional or community placement

Delinquency Cases Post-Adjudication	
Status of Youth	When to Enter
Other	Youth is in a placement not otherwise specified. Enter an explanation in the Comments field.

Dependency Case	
Status of Child	When to Enter
In home with Parent/Legal Guardian	Child is placed on an in-home plan
Relative substitute care	Child is placed in a kinship family foster care placement
Non-Relative substitute care	Child is placed in non-kinship family foster care placement
Congregate foster care	Child is placed in a congregate setting, in a hospital setting, or an out-of-state residential setting
Other	Child is in a placement not otherwise specified. Enter a comment in the Comments field.

### Closed Date (Open Case Report)

**Description:** This field reports the date the Counsel ceased providing public defense services for the client. **This field is required in the report for the month in which the case is closed.**

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

**Purpose:** Evaluating workload. Evaluating length of case activity by case type. Evaluating time to outcome.

**General Guidance:** In most cases, this should closely follow the date of final activity in Odyssey.

**Specific Guidance:**

*For Non-Delinquency cases:* Case closure typically occurs within 30 days of entry of a judgment of dismissal, a judgment of termination of counsel’s client’s rights to their child, a judgment of adoption of counsel’s client, or an order terminating counsel’s appointment. See General Term 10.3 of the contract.

*For Delinquency cases:* Case closure typically occurs within 30 days of entry of a judgment of dismissal or an order terminating counsel’s appointment, or after a youth has been subject to a protective custody warrant for a period of 180 days. See General Term 10.3 of the contract and the “Warrant Status” scenario in Appendix C.

## Comments (Open Case Report)

**Description:** This field reports additional information and data not captured by other fields. In some circumstances, this field is required.

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

**Data Validation:** This field has no validation restrictions.

**Purpose:** Multitudinous.

**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.

## Case Number (Activity Report)

**Description:** This field reports the case number for which the activity was performed.

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

**Purpose:** Evaluating time spent on work per assigned case.

**General Guidance:** In most circumstances, enter only one case number per activity. Enter the case number used for the client in the Open Case Report.

**Specific Guidance:**

*For Dependency, Guardianship, and Termination cases when representing multiple siblings in a sibling group:* Enter the case number associated with the eldest sibling in the sibling group represented by the Counsel. If a Court Activity Outcome results in a Change in Placement or case closure for non-eldest siblings, make an entry for each child for whom that outcome occurs. See Appendix C.

## Client Last Name (Activity Report)

**Description:** This field reports the last name of the client for whom the activity was performed.

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

**Purpose:** Differentiating between multiple clients associated with the same case number.

**General Guidance:** Enter only one name per entry. Enter the client's name associated with the Case Number entered.

## Client First Name (Activity Report)

**Description:** This field reports the first name of the client for whom the activity was performed.

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

**Purpose:** Differentiating between multiple clients associated with the same case number.

**General Guidance:** Enter only one name per entry. Enter the client's name associated with the Case Number entered.

## Activity (Activity Report)

**Description:** This field reports the category of activity performed on behalf of the client.

**Data Entry Type:** The user selects a value from a drop-down list of options.

**Purpose:** Evaluating time spent by category of activity.

**General Guidance:** Enter the activity that best matches the work performed by the Counsel.

**Specific Guidance:** Following is a list of Activities and guidance on when each should be selected:

Activity	When to Enter
Court	Any appearance before a judge or referee concerning the case, including court ordered case conferences. This includes orders received outside of a court appearance (e.g. an order entered in response to a motion or signed consent order) that result in a listed court activity outcome
Client contact	Any contact or attempted contact or communication with the client
CRB	Counsel participation at a Citizens Review Board hearing
Drafting motions & briefs	Any legal research and work in anticipation of writing motions, brief, memoranda of law, or other documents filed with the court and/or served on other parties to the case
Other case work	Any case work not otherwise specified

*When representing children or youth:* Client contact includes any time spent arranging for and traveling to visit youth in any placement regardless of distance. Include time spent submitting CSS and working with Corporate Travel if needed to facilitate contact with the client.

## Activity Date (Activity Report)

**Description:** This field reports the date of the activity performed on behalf of the client.

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

**Purpose:** Evaluating time spent on activities in the given month

**General Guidance:** Enter the date the listed work was performed.

## Hours Spent (Activity Report)

**Description:** This field reports the duration of time the Counsel performed the listed activity.

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

**Purpose:** Evaluating Counsel workload efficiency. Evaluating time spent per category of activity. Evaluating accuracy of workload model. Evaluating MAC target value. Reporting with stakeholders.

**General Guidance:** Enter the number of hours spent working on the listed task for the day specified in the Activity Date field. If reporting multiple Court Activity Outcomes for the same event, enter 0.0 for all related entries other than the first.

## Court Activity Outcome (Activity Report)

**Description:** This field reports the result of a Court activity. **This field is required if one of the listed outcomes occurs, even if the outcome occurs out of court.**

**Data Entry Type:** The user selects a value from a drop-down list of options.

**Purpose:** Tracking outcomes. Evaluating time spent based on outcome.

**General Guidance:** Enter the Outcome that best describes what occurred in court. If a Court Activity Outcome of Dismissed is entered, also enter a Dismissal Reason. If a Court Activity Outcome occurs outside of a Court event, report the Court Activity Outcome in the row for whichever Activity resulted in the Outcome.

**Specific Guidance:**

*For Dependency, Guardianship, or Termination cases when representing multiple siblings in a sibling group:* If a Court Activity Outcome of CIP In home, CIP Out of home, or Dismissed occurs for multiple siblings in a sibling group, or if the same event results in different outcomes for different siblings, make a separate entry for each Outcome for each Child to whom it applies.

*For Dependency, Guardianship, and Termination cases when representing a Parent or Guardian:* Report CIP Outcomes for any of the Parent or Guardian’s children.

*For Dependency, Guardianship, and Termination cases when representing a child:* Report only those CIP outcomes specific to a child represented by the Counsel.

Following are Court Appearance Outcomes and guidance for when each should be selected based on Case Type:

Delinquency	
Court Activity Outcome	When to Enter
Dismissed	The petition is dismissed by the court or withdrawn by the State
Jurisdiction	The court finds that it has jurisdiction under ORS 419C.005(1) for at least one allegation against the youth

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Delinquency	
Court Activity Outcome	When to Enter
CIP In home	Pre-Adjudication: Youth moves from any other placement to either the "In home with Parent/Legal Guardian" or "Conditional Release" Youth Status Post-Adjudication: Youth moves from any other placement to the "In home with Parent/Legal Guardian" Youth Status
CIP Out of home	Pre-Adjudication: Youth moves from either the "In home with Parent/Legal Guardian" or "Conditional Release" Youth Status to any other placement Post-Adjudication: Youth moves from the "In home with Parent/Legal Guardian" Youth Status to any other placement
Commitment	Youth is committed to the custody of OYA or DHS
Probation	Youth is placed on probation, including if a period of detention is ordered as a part of disposition
Alt. Disposition	A disposition not otherwise specified occurs
Suppression	The court grants suppression of evidence following a hearing on motion to suppress

Dependency and Guardianship	
Court Activity Outcome	When to Enter
Dismissed	The petition is dismissed by the court on motion by any party
Jurisdiction	The court finds that it has jurisdiction under ORS 419B.100
CIP In home	Child moves from any other placement to the "In home with Parent/Legal Guardian" Child Status
CIP Out of home	Child moves from the "In home with Parent/Legal Guardian" Child Status to any other placement

Termination and Contested Adoption	
Court Activity Outcome	When to Enter
Dismissed	The petition is dismissed by the court on motion by any party
Rights Terminated	The court terminates parental rights with respect to this client after a hearing

Termination and Contested Adoption	
Court Activity Outcome	When to Enter
Relinquishment	Parental rights are terminated with respect to this client by Release and Waiver or by Stipulated Judgment

## Dismissal Reason (Activity Report)

**Description:** This field reports the reason for a case’s dismissal. **This field is required if a Court Activity Outcome of Dismissed is entered.**

**Data Entry Type:** The user selects a value from a drop-down list of options.

**Purpose:** Tracking dismissal reasons. Evaluating overall client outcomes over time. Reporting with stakeholders.

**General Guidance:** Select the Dismissal Reason most appropriate for the circumstances. If an “Other” reason is selected, enter an explanation in the Comments field.

**Specific Guidance:** Following are Dismissal Reasons and guidance for when each should be selected based on Case Type:

Delinquency	
Dismissal Reason	When to Enter
Case not Proven	Case is dismissed pursuant to a motion or because the state or petitioner did not meet its burden to prove the allegations
Unfit to Proceed	Court makes a finding under ORS 419C.392(2)
Waived to Adult Court	Youth is waived into adult court
Other	The case is dismissed for a reason not otherwise specified.

Dependency	
Dismissal Reason	When to Enter
Reunification	Child is reunified with a party who had legal rights prior to the filing of the petition
Case not Proven	Case is dismissed pursuant to a motion or because the petitioner failed to meet its burden on all allegations
Aged Out	Child has aged out or opted out of foster care
Adoption	Child is adopted
Guardianship	A general guardianship is established and the court terminates appointment of counsel
Party Dismissed (Paternity)	The court enters an order of non-paternity for the party represented by the Counsel



Dependency	
Dismissal Reason	When to Enter
Other	The case is dismissed for a reason not otherwise specified.

Termination	
Dismissal Reason	When to Enter
Case not Proven	Case is dismissed pursuant to a motion or because the petitioner did not meet its burden to prove its allegations
Guardianship	Permanent guardianship granted
Other	The case is dismissed for a reason not otherwise specified.

## Comments (Activity Report)

**Description:** This field reports additional information and data not captured by other fields. In some circumstances, this field is required.

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

**Data Validation:** This field has no validation restrictions.

**Purpose:** Multitudinous.

**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.

## Appendix C: PCRCP Examples

### Case Transfer between Counsel

*Youth A is alleged to have engaged in conduct that, were they an adult, would constitute the crime of Assault in the Fourth Degree. At first appearance on the petition, Counsel N is appointed to represent Youth A.*

After appointment and in the report for each month until circumstances change:

**Counsel N** should make an entry in the Open Case Report including the case number, Youth A's last name, first name, an Open Date consistent with the order of appointment, a Case Type of **Delinquency (M)**, and a PCRCP Case Count of **1.0**.

*Three months into the case, Counsel N decides to leave public defense practice. Over the course of the following month, Counsel N and other counsel in their organization decide how to distribute Counsel N's cases. Counsel S accepts transfer of Youth A's case.*

In the report for the month in which Counsel S receives Youth A's case:

**Counsel N** should update Youth A's entry in the Open Case Report with a closed date consistent with the date of transfer and a note in the Comment field that the case has been reassigned to **Counsel S**, and then discontinue reporting.

**Counsel S** should also report Youth A's case on their own Open Case Report, updating the Open Date field to the date of the transfer. **Counsel S** should continue reporting Youth A's case in this manner consistent with regular reporting obligation.

### Diversion

*Youth W is found drawing on the walls of their school in permanent marker. The school contacts the juvenile department, who offers Youth a Formal Accountability Agreement (FAA) in lieu of prosecution for criminal mischief. The juvenile department fails to advise Youth of their right to an attorney as a part of the process, and Youth refuses the FAA. The juvenile department refers the case to the District Attorney's office, who files allegations that Youth is within the jurisdiction of the court for conduct that, if they were an adult, would constitute Criminal Mischief in the Second Degree. At first appearance on the case, Counsel P is appointed to represent Youth.*

After appointment and for each following month in which appointment remains active:

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**Counsel P** should make an entry for Youth W on the Open Case Report with the case number, county, Youth W's last name, first name, an open date consistent with the date of appointment, a case type code of **Delinquency (M)**, a PCRCP Case Count of 1, and a Status of Youth/Child Placement of **In home with Parent/Legal Guardian**.

*During discussions with the DA to resolve the case, Counsel P learns that the juvenile department offered Youth an FAA but did not refer Youth to counsel to discuss the option. Counsel P brings up the FAA with Youth and explains the costs and benefits, and Youth indicates they would now agree to an FAA. Counsel P relays this to the DA and juvenile department, who agree to proceed with an FAA but plan to keep the juvenile case open in case Youth fails it. At the next status check hearing, parties inform the court of the resolution, and the court stays the proceedings pending the outcome of the FAA.*

In the month in which Youth enters the FAA:

**Counsel P** should make the following entries:

On the Open Case Report, update the entry for Youth W with a case type code of **Formal Accountability Agreement**.

On the Activity Report, an entry with a Court Activity Outcome of **Alt. Disposition**, with a Comment reflecting that Youth entered an FAA.

*Youth is able to complete the terms of his FAA, and at a later Status Check hearing, the court dismisses the Juvenile case.*

In the month in which the court dismisses the case:

**Counsel P** should make the following entries:

On the Open Case Report, update the entry for Youth W with a Closed Date consistent with the order dismissing the case.

On the Activity Report, an entry with a Court Activity Outcome of **Dismissed** and a Dismissal Reason of **Case Not Proven**.

In the month following the month in which the court dismisses the case:

**Counsel P** should discontinue reporting Youth W's case as open.

## Warrant Status

*On February 12, Youth Z – who is in the legal custody of ODHS – is taken into protective custody and held pre-adjudication on allegations of assault. The DDA files a petition alleging conduct that, if youth were 18, would constitute the crimes of Assault in the Fourth and Harassment. Prior to initial appearance, the Juvenile*

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*Department and Youth Z's ODHS caseworker develop a safety plan placing Youth Z in a new foster placement. At initial appearance, the court appoints Counsel O to represent youth, and Youth signs a release agreement.*

*On February 19, Youth Z runs away from their foster placement. Youth Z's caseworker contacts the Juvenile Department, and the DDA files a motion to revoke Youth Z's release, which the court grants. The court issues a protective custody warrant.*

In the report for February:

**Counsel O** should update the Status of Youth/Child Placement to **Other** and make a note in the Comment field that the youth is on warrant status. Counsel should continue to report Youth Z's case.

*In early March, Youth Z has contact with police and is held on the protective custody warrant. Youth Z's caseworker is contacted and works with the juvenile department to draft a new safety plan and release agreement to place youth back in the previous foster home. In late March, Youth Z again runs away from their foster placement. Counsel O has no further contact with Youth Z.*

In the reports for March, April, May, June, and July:

**Counsel O** should continue to report Youth Z's case as open, with a Status of Youth/Child Placement of **Other** and a comment indicating that Youth Z is on warrant status.

In the report for August:

**Counsel O** should enter a Closed Date on or around August 19 and then discontinue reporting Youth Z's case.

## Waiver Exposure

*Youth X is taken into protective custody on allegations of sexual abuse. The District Attorney's office files a petition seeking to make Youth X a ward of the court alleging that they committed acts that, if Youth X were an adult, would constitute the crime of Sexual Abuse in the First Degree. At initial appearance, Counsel M is appointed to represent Youth X. The court that it is in Youth X's best interest to remain in detention pending adjudication and that there is no less restrictive alternative than to do so.*

After accepting appointment, and for each month in which the appointment remains active:

**Counsel M** should make entries as follows:

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In the Open Case Report, an entry for Youth X with the Case Number, County, Youth X's last and first names, an Open Date consistent with the date on the order of appointment, a Case Type of **Delinquency (M11)**, a PCRCP Case Count of 1, and a Status of Youth/Child Placement of **Detention**.

In the Activity Report, a Court Activity Outcome of **CIP Out of home**.

*During discussions between Counsel M and the District Attorney about the case, the District Attorney starts dropping hints that they may file a motion to waive Youth X's case into Criminal court.*

**Counsel M** may wish to consider making a request for OPDS to grant the case additional weight due to Extraordinary Circumstances based on the anticipate waiver motion.

If OPDS grants additional weight, for each reporting month for which the additional weight is granted:

**Counsel M** should update Youth X's entry in the Open Case Report with an Additional Case Weight entry of **Approved Extraordinary Case Circumstances** and a PCRCP Case Count consistent with the additional weight granted.

*The District Attorney follows through and files a motion to waive Youth X's case into Criminal court.*

In the month in which the waiver motion is filed and for all months in which the motion is pending for any portion of that month:

**Counsel M** should update Youth X's entry in the Open Case Report with a Case Type of **Delinquency M11 Waiver (M11W)** and a PCRCP Case Count of 2. If additional case weight was previously granted, counsel should clear that field and may re-request additional case weight if the work associated with the case is beyond what would be anticipated in a Waiver case.

*The court holds a hearing on the waiver motion and -*

***The motion is denied:***

In the month following the month in which the waiver motion is denied:

**Counsel M** should update Youth X's entry in the Open Case Report back to **Delinquency (M11)** and a PCRCP Case Count of 1.

*The court holds a hearing on jurisdiction, finds jurisdiction, and commits Youth X to the custody of OYA.*

In the month in which Youth X is committed to the custody of OYA:

**Counsel M** should discuss with Youth X whether to continue providing representation and, if Youth X wishes **Counsel M** to do so, make the following entries:

In the Open Case Report for Youth X's case, update the Status of Youth/Child Placement to **OYA Custody**. (Because the offense is a sex crime, the base weight of the case remains 1.0)

In the Activity Report, a Court Activity Outcome of **Commitment**.

*The motion is granted:*

In the month in which the Juvenile case is dismissed:

**Counsel M** should make the following entries:

In the Open Case Report for Youth X's case, a Closed Date consistent with the date of the judgment of dismissal and a comment including the Criminal case number.

In the Activity Report, a Court Activity Outcome of **Dismissed** and a Dismissal Reason of **Waived to Adult Court**.

## Additional Petition Filed

*Mother A, Father B, and Child Z are currently parties to a Dependency case. Mother A is represented by Counsel M and has an established jurisdictional basis regarding substance abuse issues. Father B is represented by Counsel N; his current location is unknown, and he has established jurisdictional bases regarding housing insecurity and substance abuse. Child Z is represented by Counsel O and has been placed in home with Mother A for the last three months. Mother A was recently involved in a domestic violence incident with Partner C. Last night, ODHS removed Child Z from Mother A and filed a Second Petition over Child Z alleging jurisdiction based on the domestic violence incident.*

After accepting appointment on the Second Petition:

**Counsel M** should make the following entry:

In the Open Case Report for Mother A's Dependency case, update the PCRCP Case Count field with a value of 2 and in the Comments field enter a note that a second petition was filed and the date of the second petition.

**Counsel N**, if appointed, should make a similar entry to **Counsel M**.

**Counsel O** should make the following entries:

In the Activity Report, a Court Activity Outcome of **CIP Out of home**.

In the Open Case Report for Child Z's Dependency case, update the PCRCP Case Count field with a value of 2, update the Status of Youth/Child Placement to reflect the new placement for the child and, in the Comments field, enter a note that a second petition was filed and the date of the second petition.

*Mother A signs an admission statement admitting to the new allegation in the second petition. The court accepts the admission and issues a judgment finding jurisdiction over Child Z on the new jurisdictional basis.*

In the month in which the court issues the judgment finding jurisdiction on the new basis,

**Counsel M, O, and N (if appointed)** should make the following entries:

In the Activity Report, on the day the hearing is held from which the judgment issues, a Court Activity Outcome of **Jurisdiction**.

In the month following the month in which the court issues the new judgment,

**Counsel M, N, and O** should make the following entry:

In the Open Case Report for the relevant Dependency case, update the PCRCP Case Count field with a value of 1, and in the Comments field enter a note with the disposition date of the second petition. Counsel need not continue entering these comments in subsequent months.

## Complex Sibling Group Reporting

*Mother A has six children who are all before the court in a Dependency proceeding: U, V, W, X, Y, and Z (listed in order of age, eldest to youngest). Father B is the father of children W, X, and Y, and Father C is the father of Child Z. It has been determined that there are conflicts among groups of the children, and the parties are variously represented by different Counsels as follows:*

Counsel J represents Mother A;  
Counsel K represents Father B;  
Counsel L represents Father C;  
Counsel M represents children U and V;  
Counsel N represents children W, X, and Y; and  
Counsel O represents child Z.

After appointment on the Dependency petitions and for each month in which those representations remain current,

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**Counsel J** should make a single entry on the Open Case Report including the case number for the petition specific to Child U, Mother A's last name, first name, an Open Date reflecting the date of appointment to the case, the Case Type **Dependency (Parent)**, and a PCRCP Case Count of 1.

**Counsel K** should make a single entry on the Open Case Report including the case number for the petition specific to Child W, Father B's last name, first name, an Open Date reflecting the date of appointment to the case, the Case Type **Dependency (Parent)**, and a PCRCP Case Count of 1.

**Counsel L** should make a single entry on the Open Case Report including the case number for the petition specific to Child Z, Father C's last name, first name, an Open Date reflecting the date of appointment to the case, the Case Type **Dependency (Parent)**, and a PCRCP Case Count of 1.

**Counsel M** should enter each sibling on a separate row as follows:

An entry for Child U on the Open Case Report with the case number of the petition specific to Child U, their last name, first name, an Open Date reflecting the date of appointment to the case, the Case Type **Dependency (Child)**, and a PCRCP Case Count of 1.

An entry for Child V on the Open Case Report with the case number of the petition specific to Child V, their last name, first name, an Open Date reflecting the date of appointment to the case, the Case Type **Dependency (Additional Children)**, and a PCRCP Case Count of 0.5.

**Counsel N** should enter each sibling on a separate row as follows:

An entry for Child W on the Open Case Report with the case number of the petition specific to Child W, their last name, first name, an Open Date reflecting the date of appointment to the case, the Case Type **Dependency (Child)**, and a PCRCP Case Count of 1.

An entry for Child X on the Open Case Report with the case number of the petition specific to Child X, their last name, first name, an Open Date reflecting the date of appointment to the case, the Case Type **Dependency (Additional Children)**, and a PCRCP Case Count of 0.5.

An entry for Child Y on the Open Case Report with the case number of the petition specific to Child Y, their last name, first name, an Open Date reflecting the date of appointment to the case, the Case Type **Dependency (Additional Children)**, and a PCRCP Case Count of 0.5.

**Counsel O** should make a single entry for Child Z on the Open Case Report with the case number of the petition specific to Child Z, their last name, first name, an Open Date reflecting the date of appointment to the case, the Case Type **Dependency (Child)**, and a PCRCP Case Count of 1.



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*At jurisdictional, the court finds that Child U is not within the jurisdiction of the court, but that the remainder of the children are. The court dismisses the petition over Child U and issues a judgment of jurisdiction and disposition for the remaining children making them wards of the court.*

In the report for the month in which Child U's case is dismissed,

**Counsel M** should add an entry in the Activity Report with the Case Number and Client Name for Child U, a Court Activity Outcome of **Dismissed**, and a Dismissal Reason of **Case Not Proven**. **Counsel M** should make a second entry in the Activity Report with the Case Number and Client Name for Child V, an Hours Spent of 0.0, and a Court Activity Outcome of **Jurisdiction**. **Counsel M** should additionally enter in Child U's row on the Open Case Report a Closed Date consistent with the date of the judgment dismissing Child U's case.

**Counsels J, K, L, N, and O** should enter in the Activity Report, for each of their clients, a Court Activity Outcome of **Jurisdiction**. **Counsel N** should make sure to enter Hours Spent of 0.0 for Children X and Y.

In the report for the month following the month in which Child U's case is dismissed,

**Counsel M** should no longer report Child U on their Open Case Report and in the Open Case Report should begin entering on the row for Child V the Case Type **Dependency (Child)** and a PCRCP Case Count of 1 and should continue entering those values moving forward.

**Counsel J** should begin entering in their Open Case Report the Case Number specific to Child V's case and should continue entering that Case Number going forward.

*Child Z is returned to Father C, and Child Z's case is dismissed.*

In the report for the month in which Child Z's case is dismissed,

**Counsels L and O** should enter in the Activity Report a Court Activity Outcome of **Dismissed** and a Dismissal Reason of **Reunification**. On the Open Case Report, both Counsels should enter a Closed Date consistent with the date of the Judgment dismissing Child Z's case, and discontinue reporting for Father C and Child Z.

*The court changes the plan for children V, W, X, and Y to adoption, and petitions to terminate Mother A and Father B's rights are filed. Mother A and Father B both appear at combined first appearances on their petitions.*

**Counsels J, K, M, and N** should all continue reporting the open dependency cases as they have been.

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In the report for the month of appointment on the Termination petitions and for each month in which those representations remain current,

**Counsel J** should make a second entry in the Open Case Report including the case number specific to the Termination petition seeking to terminate Mother A's rights to Child V, Mother A's last name, first name, an Open Date reflecting the date of appointment to the case, the Case Type **Termination (Parent)**, and a PCRCP Case Count of 1.

**Counsel K** should make a second entry in the Open Case Report including the case number specific to the Termination petition seeking to terminate Father B's rights to Child W, Father B's last name, first name, an Open Date reflecting the date of appointment to the case, the Case Type **Termination (Parent)**, and a PCRCP Case Count of 1.

**Counsel M** should make a second entry in the Open Case Report including the case number specific to the Termination petition seeking to terminate Mother A's rights to Child V, Child V's last name, first name, an Open Date reflecting the date of appointment to the case, the Case Type **Termination (Child)**, and a PCRCP Case Count of 1.

**Counsel N** should make additional entries as follows:

A second entry in the Open Case Report for Child W including the case number specific to the Termination petition seeking to terminate Mother A's rights to them, Child W's last name, first name, an Open Date reflecting the date of appointment to the case, the Case Type **Termination (Child)**, and a PCRCP Case Count of 1.

A second entry in the Open Case Report for Child X including the case number specific to the Termination petition seeking to terminate Mother A's rights to them, Child X's last name, first name, an Open Date reflecting the date of appointment to the case, the Case Type **Termination (Additional Children)**, and a PCRCP Case Count of .5.

A second entry in the Open Case Report for Child Y including the case number specific to the Termination petition seeking to terminate Mother A's rights to them, Child Y's last name, first name, an Open Date reflecting the date of appointment to the case, the Case Type **Termination (Additional Children)**, and a PCRCP Case Count of .5.

*At a pre-trial conference on the termination petitions, Father B appears but Mother A is not present. ODHS immediately moves forward with a Prima Facie case against Mother A, and the Court grants the petition to terminate Mother A's rights to children V, W, X, and Y.*

In the report for the month in which Mother A's rights to V, W, X, and Y are terminated,

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**Counsel J** should make the following entries:

On the Activity Report, an entry with the Case Number specific to the Termination Petition seeking to terminate Mother A's rights to Child V, and a Court Activity Outcome of **Rights Terminated**.

On the Activity Report, a second entry with the Case Number specific to the Dependency Petition over Child V, an Hours Spent of 0.0, and Court Activity Outcome of **Rights Terminated**.

On the Open Case Report, on both rows for Mother A, a Closed Date consistent with the date of the Judgment terminating A's rights to Child V.

**Counsel K** need not change their reporting for Father B.

**Counsel M** should Make the following entries:

On the Activity Report, an entry with the Case Number specific to the Termination Petition terminating Mother A's rights to Child V, and a Court Activity Outcome of **Rights Terminated**.

On the Open Case Report in the row for Child V's Termination case, a Closed Date consistent with the date of the Judgment terminating Mother A's rights to Child V.

**Counsel N** should make the following entries:

On the Activity Report an entry with the Case Number specific to the Termination Petition seeking to terminate Mother A's rights to Child W and a Court Activity Outcome of **Rights Terminated**.

On the Activity Report, a second entry with the Case Number specific to the Termination Petition seeking to terminate Mother A's rights to Child X, an Hours Spent of 0.0, and a Court Activity Outcome of **Rights Terminated**.

On the Activity Report, a third entry with the Case Number specific to the Termination Petition seeking to terminate Mother A's rights to Child Y, an Hours Spent of 0.0, and a Court Activity Outcome of **Rights Terminated**.

On the Open Case Report, on the rows for each of the Children W, X, and Y's Termination cases, a Closed Date consistent with the date of the Judgment terminating Mother A's rights to them.

In the report for the month following the month in which Mother A's rights to V, W, X, and Y are terminated,

**Counsel J** should discontinue reporting both the Dependency and Termination cases for Mother A.

**Counsel K** need not change their reporting for Father B.

**Counsel M** should discontinue reporting Child V's Termination case but continue reporting their Dependency case.

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**Counsel N** should begin entering on the Open Case Report in the rows for the Termination cases for children W, X, and Y the case number specific to the termination petition seeking to terminate Father B's rights to each of them, respectively, and should continue to enter those case numbers going forward.

*After further discussions among the parties, a settlement is reached to establish a general guardianship over W, X, and Y. The court dismisses the remaining Termination cases, changes the plan to guardianship, and ultimately enters a judgment establishing the proposed guardianship, in which the appointment of counsel is terminated for Father B, but is continued for Children W, X, and Y.*

In the report for the month in which the Termination cases are dismissed:

**Counsel K** should make the following entries:

On the Activity Report, an entry with the Case Number specific to the Termination Petition seeking to terminate Father B's rights to Child W, a Court Activity Outcome of **Dismissed**, and a Dismissal Reason of **Case not Proven**.

On the Open Case Report in the row for Father B's Termination case, a Closed Date consistent with the date of the Judgment dismissing the case.

**Counsel N** should make the following entries:

On the Activity Report, an entry with the Case Number specific to the Termination Petition seeking to terminate Father B's rights to Child W, a Court Activity Outcome of **Dismissed**, and a Dismissal Reason of **Case Not Proven**.

On the Activity Report, a second entry with the Case Number specific to the Termination Petition seeking to terminate Father B's rights to Child X, an Hours Spent of 0.0, a Court Activity Outcome of **Dismissed**, and a Dismissal Reason of **Case Not Proven**.

On the Activity Report, a third entry with the Case Number specific to the Termination Petition seeking to terminate Father B's rights to Child Y, an Hours Spent of 0.0, a Court Activity Outcome of **Dismissed**, and a Dismissal Reason of **Case Not Proven**.

On the Open Case Report, in the rows for each of the Children W, X, and Y's Termination cases, a Closed Date consistent with the date of the Judgment dismissing the case.

**Counsel M** need not change their reporting for Child V.

In the report for the month in which the guardianship is established:

**Counsel K** should make the following entries:

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On the Activity Report, an entry with the Case Number specific to the Dependency case over Child W, a Court Activity Outcome of **Dismissed**, and a Dismissal Reason of **Guardianship**.

On the Open Case Report in the row for Father B's Dependency case, a Closed Date consistent with the date of the Judgment establishing the Guardianship.

**Counsel M and N** need not change their reporting for Children V, W, X, or Y.

In the report for the month following the month in which the guardianship is established:

**Counsel K** should discontinue reporting the case for Father B.

**Counsel N** should begin entering in the Open Case Report the Case Type **Guardianship (Child)** for Child W, and **Guardianship (Additional Children)** for Children X and Y and should continue to enter those Case Type Codes going forward.

**Counsel M** need not change their reporting for Child V.

*Child V's adoption finalizes, and the court enters a judgment dismissing Child V's Dependency case. At the same time, Counsel N has a conversation with Children W, X, and Y, who all agree that they no longer need representation. Counsel N files a motion to withdraw, which is granted.*

In the report for the month in which Child V's case is dismissed,

**Counsel M** should make the following entries:

On the Activity Report, an entry with the Case Number specific to Child V's Dependency case, a Court Activity Outcome of **Dismissed** and a Dismissal Reason of **Adoption**.

On the Open Case Report in the row for Child V's Dependency case, a Closed Date consistent with the date of the Judgment dismissing Child V's case.

**Counsel M** should then discontinue reporting Child V's Dependency case.

In the report for the month in which the court grants Counsel N's motion to withdraw,

**Counsel N** should make the following entries:

On the Activity Report, an entry with the Case Number specific to Child W's Dependency case, and a Court Activity Outcome of **Withdrawal**.

On the Activity Report, a second entry with the Case Number specific to Child X's Dependency case, an Hours Spent of 0.0, and a Court Activity Outcome of **Withdrawal**.

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On the Activity Report, a third entry with the Case Number specific to Child Y's Dependency case, an Hours Spent of 0.0, and a Court Activity Outcome of **Withdrawal**.

On the Open Case Report, in the row for each of Children W, X, and Y, a Closed Date consistent with the Order allowing **Counsel N** to withdraw.