

# Submission of the Judicial Council Monthly Court Activity Reports by County Clerks

Presented by:
Sandra Mabbett
Judicial Information Analyst
Office of Court Administration (OCA)



#### **Judicial Information Section**

- ► Collects, analyzes and publishes court activity statistics, directory and other information received from more than 2,700 courts
- ▶ Provides assistance to court staff, case management vendors and local information technology staff on report guidelines and submissions



#### **Today's Topics**

- ► Submitting the Report
  - **►**Manually
  - ► Electronically (via XML)
- ▶ Reviewing the Report
- ► Making Corrections to the Report



## Submitting Reports



# CARD - Court Activity Reporting and Directory System <a href="http://card.txcourts.gov">http://card.txcourts.gov</a>

	Bu	ild Version 1.1.4707.27725		Hel
	<u>Public Judicial Directory</u> A Login ID is not needed to access public information. <u>Public Court Activity Data:</u> New Data (Distric/Courty Courts for §1/1/10 and later &			
No.	Justice/Municipal Courts for 9/1/10 and later &			
		Run Reports	Ad Hoc Search	
OCA	Old Data (District/County Courts Prior to 9/1/10 & Justice/Municipal Courts Prior to 9/1/11):			
		Run Reports	Ad Hoc Search	
	Login ID:			
	Password:			
		Log	gin	
		Forgotten Password?	Expired Password?	
			technical issues, email the Help Desk tions, email the Reporting Section,	
		or call the Office of Court Adm	inistration at (512) 463-1625.	



# CARD - Court Activity Reporting and Directory System

- ► Anyone can get reports with the most up-to-date data
- Clerks log in to submit the monthly reports
  - ► Electronically via XML report, or
  - ▶ Data entry



#### **Case Management Systems**

- ▶ Vendor/local IT staff creates the codes used in your system to track the information; OCA does not create or specify codes to be used in the case management systems
- ▶ Vendor/local IT staff responsible for all programming of the system and all programming to produce the necessary reports (including producing an XML file to report data to OCA)



#### **Submitting Reports**

All courts must submit the report <u>online</u> unless a waiver has been received from OCA to send the report to our office for data entry

To obtain a Login ID and password, or for password resets, contact OCA's **Service Desk**:

(512) 463-1642

Or

service.desk@txcourts.gov



#### **Submitting Reports**

- ▶ Using the unique 9 digit login ID and password assigned, login ID to submit monthly report
- ▶ If individuals share the responsibility of submitting the report, they will share the login ID and password



#### **Submitting Reports**

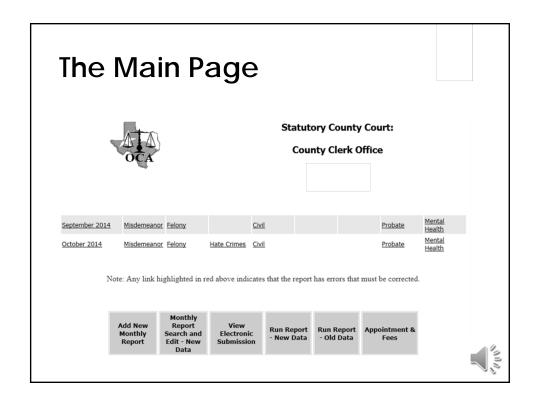
- ▶ If you also are also responsible for reporting activity for the statutory county court, you must use a separate unique 9 digit login ID and password
- ► The activity reported for a constitutional county court may not be combined with the activity reported for a statutory county court



#### **Main Page**

- ► All reports/sections submitted in the current fiscal year are displayed
- ► Sections with errors will display in **RED**
- ► On October 1st of each year, the page resets to show reports received for next fiscal year





#### Main Page

- Add New Monthly Report to manually enter a report
- ► View Electronic Submission to <u>upload</u> a report (XML file)
- ► Search and Edit New Data reports submitted for Sept. 2010 and later may be <u>viewed and edited</u>
- ▶ Run Report New Data reports may be run for Sept. 2010 to present
- ► Run Report Old Data reports may be run for Sept. 1992 through Aug. 2010
- ▶ Appointments and Fees to submit these required monthly reports



#### **Manually Entering a Report**

► Select *Add New Monthly Report* 





#### Manually Entering a Report

- Only enter a number where you have activity to report
- Once you click on Submit, the system will automatically fill in zeroes where there is nothing reported

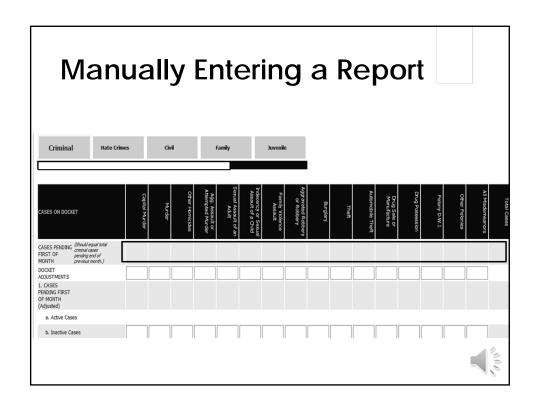


#### Manually Entering a Report

► Enter reports sequentially (in order)

Monthly Report				
Build Version 1.1.5268.15984	Last Login: 12/2/2014 2:00:19 PM	Lancott I Hall		
		Logout   Hel		
County Main Menu > Monthly Report Search > I	Monthly Report			
2244				
Year: 2014 ✓				
Month: November				
County Clerk Office				
COUNTY CLERK:				
John Warren				
Section: Misdemeanor  Continue				

8



#### Manually Entering a Report

►After entering a section, make sure you receive "saved successfully" message





- ► File must be formatted properly and have all critical information to successfully upload
- ▶ Refer to website for
  - ► XML specifications
  - Program to validate XML file format (XML Tester)
  - Frequently Asked Questions XML File Submission
  - Frequently Asked Questions Online Report Submission



#### **Uploading a Report**

- ▶ Run report from your case management system
- ► XML file gets generated from your case management software and saved somewhere on your computer/ network
- ▶ If you do not know where XML file stored on your computer, you will need to contact <u>your vendor or local IT staff</u> for assistance

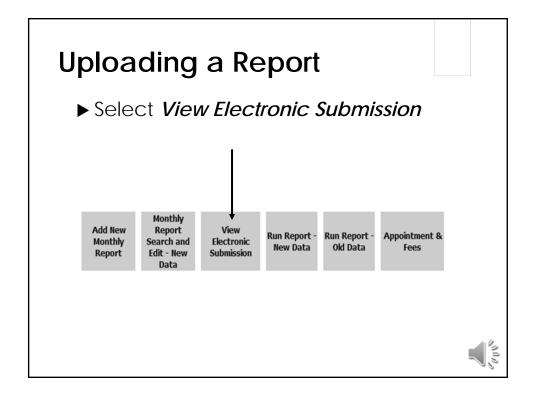


► Reports must be uploaded in chronological order (Sept., Oct., etc.)

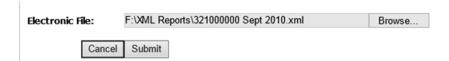
File:

The previous month has not been submitted. If no reports have been submitted this fiscal year please submit September.

Cancel Submit



▶ Browse to find XML file on your computer/ network



- ► Click on Submit goes to Criminal Section if no formatting errors in the file
- No need to open each section and press Submit



#### **Uploading a Report**

- ► Successful upload of file does not mean that there are no errors in the file
- ▶ Review what has been loaded into the database and compare it to the report generated from your case management system



- ►XML file that is not properly formatted/missing critical information will not upload and an error message will be received
- ►The vendor/local IT staff must correct the file



#### **Document Unusual Activity**

- Use Notes Section at the bottom of each report section to account for unusual /inconsistent reporting figures such as
  - ► Large docket adjustments after validation of pending case numbers or due to conversion to new case management system
  - ► Higher or lower number of cases reported in a category due to unusual circumstance (DWOP docket, court closed due to storm damage)



Document Unusual Activity			
Notes:	Docket adjustments are due to a manual hand count done to validate total pending cases.		
Prepared By:	Joe Smith		
<u>Submit</u>			

#### **Notes Section**

- ▶ Do not enter questions or other things for which you are expecting a response from OCA
- ► Send an email to <u>JudInfo@txcourts.gov</u> to contact Judicial Information staff



## Provide Name of Contact Person

Name displayed at top of screen does NOT indicate what office or individual submitted the report

#### Statutory County Court: County Court at Law No. 1

Judge: Amanda Matzke
Clerk: Karen McQueen

> Monthly Report Search > Monthly Report

► Put full name of contact person in Prepared by line—this indicates who submitted the report \_\_\_\_

### Reviewing the Report

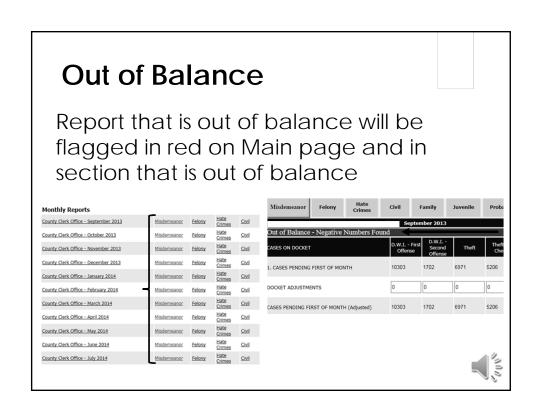
"Quality Means Doing it Right When No One is Looking" (Henry Ford)

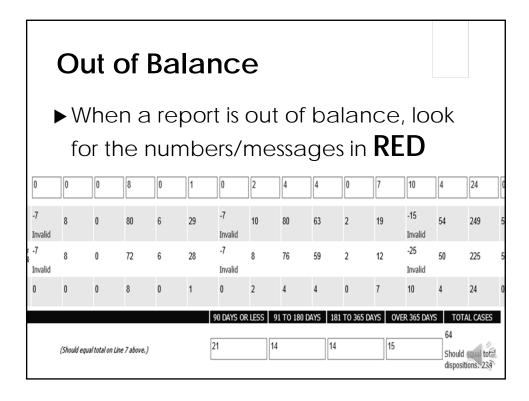


#### Review the Report

▶ Review your submitted report each month for accuracy, particularly if you upload your report, even if it is not out of balance

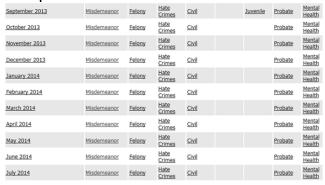






#### **Out of Balance**

▶ Reports that are out of balance should be corrected before submitting any subsequent months





#### **Common Issues**

- ▶Filings, docket adjustments, dispositions, or pending case numbers that are too low, too high, or that do not make any sense
  - **▶**Typos
  - ►Numbers entered in wrong line
  - ▶ Recent updates to cases management system



#### **Common Issues**

- ▶ Docket Adjustments
  - ▶Is one needed?
  - ▶If one is entered, is it correct? Needs explanation?
- No new cases filed or no dispositions



#### **Common Issues**

- ►Uploaded report does not match report printed from case management system
- ► Uploaded report that shows zeroes in all lines except pending cases and Total Cases on Docket



#### **Review the Report**

- ▶ Refer to the report instructions to understand what should be reported where
- ▶ Contact your software vendor/IT if obvious programming issues are found
- ► Contact OCA if you have questions or need our assistance



#### **Annual Data Verification**

- ► Letter with a copy of the report combining all data submitted for fiscal year is sent to the clerk for verification of the data in October
- ► Corrections must be made to individual months in the reporting database



### **Correcting the Report**

"A man who has committed a mistake and doesn't correct it, is committing another mistake" (Confucius)





#### **Correcting the Report**

- ► Corrections may be made by
  - ▶Uploading a corrected XML file
  - ► Having OCA delete all previously submitted reports so you can upload new ones or
  - ► Manually entering the changes into the existing reports



#### **Correcting the Report**

- ► Corrections:
  - ► Must be made to reports for individual months
  - ►Must be made sequentially because of pending case balances



#### **Correcting the Report**

- ▶ Corrections:
  - ▶Uploaded reports need to be reviewed just like when the report was originally submitted to ensure accuracy
  - ▶ Review reports for subsequent months to check for additional corrections that may need to be made



#### **Correcting the Report**

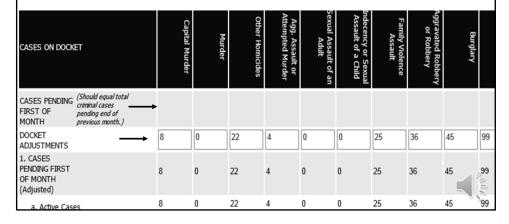
► Example of sections that were skipped





#### **Correcting the Report**

► Example of docket adjustments entered to add pending balances



#### **Questions**

<u>JudInfo@txcourts.gov</u>

(512) 463-1625 OCA main phone

(512) 463-1865 fax

