

Performance Measures Reporting

88TH LEGISLATIVE SESSION- HB2384

TEXAS OFFICE OF COURT ADMINISTRATION

DATA & RESEARCH DIVISION



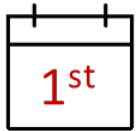
HB 2384- Report Requirements & Information



Frequency: **Annually**



Date Range: **1st Report-** March 2024 – August 2024
Subsequent Reports: **September – August (State FY)**



Due Date: **November 1st**



Submission: **Excel template**
To: **data.division@txcourts.gov**

HB 2384- Instructions & Guidance

Txcourts.gov

Judicial Data

Reporting to
OCA

District & Court
Level Reporting
(New)

Reporting to OCA

Site Search

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REPORTING TO OCA HOME

- Appointments and Fees
 - Change in Municipal Judge
 - Citation by Publication
 - Court Interpretation Services
 - Court Security Incident Reports
 - District & County Court-Level Reporting
 - Guardianship Reporting Requirements
 - Judicial Bypass Cases
- Judicial Council Trial Court Activity Reports
 - Jury Charges & Sentences in Capital Cases
 - Other Resources
 - Protective Order Registry
 - Settlement Database
 - Vexatious Litigants
 - Writs of Attachment

REPORTING TO OCA

The following reports must be submitted to the Office of Court Administration by clerks, judges, or other entities or individuals.

Court Security Program

- Court Security Incident Reports
- Court Closures and Reopenings

Guardianship Certification Program

- Guardianship Reporting Requirements


Data and Research Division


- Appointments and Fees for Attorney or Guardian Ad Litem, Guardians, Mediators and Competency Evaluators
- Change in Municipal Judge
- Court Interpretation Services (SB 380/HB 3474) **NEW**
- District & County Court-Level Reporting (HB 1182 & HB 2384) **NEW**
- Judicial Bypass Cases
- Judicial Council Trial Court Activity Reports
- Jury Charges and Sentences in Capital Cases
- Vexatious Litigants
- Writs of Attachment

Reporting Instructions & Guidance Documents

[Reporting Instructions](#) 

[Probate/Mental Health Guidance](#) 

[Guidance on Transfers between Courts of the Same Level](#) 

[Frequently Asked Questions](#) 

Please send questions to judinfo@txcourts.gov.

Report Submission and Templates


Templates


Fill out the template that corresponds to the court level being reported. Make sure the **Court Identifier** and **Court Name** match the format and text in the **Court Identifiers Spreadsheet**. Case Management System Vendors and local IT staff should reference the **Court Identifiers Spreadsheet** if templates are developed in the CMS.

[Court Identifiers Spreadsheet](#) 

[HB 2384 District Courts](#) 

[HB 2384 Statutory County Courts](#) 

[HB 2384 Statutory Probate County Courts](#) 

[HB 2384 Constitutional County Courts](#) 

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Submission

Please email your reports to data.division@txcourts.gov.

HB 2384 Report Requirements & Information

HB 2384 – Annual Performance Measures Report by Court

- ▶ Requires clerks to annually submit the following information for **each** district court, statutory county court, statutory probate court, and county court :
 1. the court's clearance rate;
 2. the average time a case is before the court from filing to disposition; and
 3. the age of the court's active pending caseload.

- ▶ Requires OCA to annually collect and publish a report including this information for **each** court.

Report

1. Number of **active pending** cases as of September 1
2. Number of cases **filed** during the year Number of cases **reactivated** during the year
3. Number of cases **disposed or adjudicated** (juvenile) during the year
4. Number of cases placed on **inactive** status during the year
5. Number of **active pending** cases as of August 31

- ▶ Most information **already reported** on Judicial Council Monthly Reports, and can be gathered from these reports
- ▶ Exceptions are dispositions/adjudications and pending for probate, guardianship and mental health cases and

County -> Court Level Example

CRIMINAL CASES									
Cases on Docket:	Burglary	Theft	Auto Theft	Drug Sale or Manufacture	Drug Possession	Felony DWI	Other Felony	All Misdemeanors	Total Cases
Cases Pending 2/1/2024:									
Active Cases									
Inactive Cases									
Docket Adjustments	0	0	0	0	0	0	0	0	0
Cases Added:									
Filed by Indictment or Information									
Other Cases Reaching Docket:									
Motions to Revoke Filed									
Cases Reactivated									
All Other Cases Added									
Total Cases on Docket:									



Court Identifier	Court Name	Fiscal Year	Felony Active Pending Sep	Felony Cases Filed	Felony Cases Reactivated	Felony Cases Disposed

HB 2384 Excel Template with corresponding line number(s) from monthly report.

Felony Active Pending Mar 1 (Line 1a)	Felony Cases Filed (Add Lines 2,3,5 for total)	Felony Cases Reactivated (Line 4)	Felony Cases Disposed (Line 7)	Felony Cases Placed on Inactive Status (Line 8)	Felony Active Pending Aug 31 (Line 9a)	Felony AoC Disposed - 90 Days or Less (Line 10)	Felony AoC Disposed - 91 to 180 Days (Line 10)	Felony AoC Disposed - 181 to 365 Days (Line 10)	Felony AoC Disposed - Over 365 Days (Line 10)	Felony AoC Disposed - Total (Line 10)	Felony Active Pending Aug 31 - 90 Days or Less	Felony Active Pending Aug 31 - 91 to 180 Days	Felony Active Pending Aug 31 - 181 to 365 Days	Felony Active Pending Aug 31 - Over 365 Days	Felony Active Pending Aug 31 - Total (Line 9a)
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Misdemeanor Active Pending Mar 1 (Line 1a)	Misdemeanor Cases Filed (Add Lines 2,3,5 for total)	Misdemeanor Cases Reactivated (Line 5)	Misdemeanor Cases Disposed (Line 8)	Misdemeanor Cases Placed on Inactive Status (Line 9)	Misdemeanor Active Pending Aug 31 (Line 10a)	Misdemeanor AoC Disposed - 30 Days or Less (Line 11)	Misdemeanor AoC Disposed - 31 to 60 Days (Line 11)	Misdemeanor AoC Disposed - 61 to 90 Days (Line 11)	Misdemeanor AoC Disposed - Over 90 Days (Line 11)	Misdemeanor AoC Disposed - Total (Line 11)	Misdemeanor Active Pending Aug 31 - 30 Days or Less	Misdemeanor Active Pending Aug 31 - 31 to 60 Days	Misdemeanor Active Pending Aug 31 - 61 to 90 Days	Misdemeanor Active Pending Aug 31 - Over 90 Days	Misdemeanor Active Pending Aug 31 - Total (Line 10a)
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Civil Active Pending Mar 1 (Line 1a)	Civil Cases Filed (Add Lines 2 & 4 for total)	Civil Cases Reactivated (Line 4)	Civil Cases Disposed (Line 7)	Civil Cases Placed on Inactive Status (Line 8)	Civil Active Pending Aug 31 (Line 9a)	Civil AoC Disposed - 3 Months or Less (Line 10)	Civil AoC Disposed - Over 3 to 6 Months (Line 10)	Civil AoC Disposed - Over 6 to 12 Months (Line 10)	Civil AoC Disposed - Over 12 to 18 Months (Line 10)	Civil AoC Disposed - Over 18 Months (Line 10)	Civil AoC Disposed - Total (Line 10)	Civil Active Pending Aug 31 - 3 Months or Less	Civil Active Pending Aug 31 - Over 3 to 6 Months	Civil Active Pending Aug 31 - Over 6 to 12 Months	Civil Active Pending Aug 31 - Over 12 to 18 Months	Civil Active Pending Aug 31 - Over 18 Months	Civil Active Pending Aug 31 - Total (Line 9a)
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Family Active Pending Mar 1 (Line 1a)	Family Cases Filed (Add Line 2 & 4 for total)	Family Cases Reactivated (Line 3)	Family Cases Disposed (Line 6)	Family Cases Placed on Inactive Status (Line 7)	Family Active Pending Aug 31 (Line 8a)	Family AoC Disposed - 3 Months or Less (Line 9)	Family AoC Disposed - Over 3 to 6 Months (Line 9)	Family AoC Disposed - Over 6 to 12 Months (Line 9)	Family AoC Disposed - Over 12 to 18 Months (Line 9)	Family AoC Disposed - Over 18 Months (Line 9)	Family AoC Disposed - Total (Line 9)	Family Active Pending Aug 31 - 3 Months or Less	Family Active Pending Aug 31 - Over 3 to 6 Months	Family Active Pending Aug 31 - Over 6 to 12 Months	Family Active Pending Aug 31 - Over 12 to 18 Months	Family Active Pending Aug 31 - Over 18 Months	Family Active Pending Aug 31 - Total (Line 8a)
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Juvenile Active Pending Mar 1 (Line 1a)	Juvenile Cases Filed (Add Line 2, 3, 4, & 6-total)	Juvenile Cases Reactivated (Line 5)	Juvenile Cases Disposed (Line 8)	Juvenile Cases Placed on Inactive Status (Line 9)	Juvenile Active Pending Aug 31 (Line 10a)	Juvenile AoC Disposed - 30 Days or Less (Line 11)	Juvenile AoC Disposed - 31 to 90 Days (Line 11)	Juvenile AoC Disposed - 91 to 180 Days (Line 11)	Juvenile AoC Disposed - Over 180 Days (Line 11)	Juvenile AoC Disposed - Total (Line 11)	Juvenile Active Pending Aug 31 - 30 Days or Less	Juvenile Active Pending Aug 31 - 31 to 90 Days	Juvenile Active Pending Aug 31 - 91 to 180 Days	Juvenile Active Pending Aug 31 - Over 180 Days	Juvenile Active Pending Aug 31 - Total (Line 10a)
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Clearance Rate Defined

▶ OCA will calculate the clearance rate from the information submitted

▶ Clearance Rate =

Cases **disposed or adjudicated** + Cases placed on **inactive** status

Divided by

Cases **filed** + Cases **reactivated**

Case Aging from Filing to Disposition Defined

For **each district or county court** in your jurisdiction, report the number of cases disposed within each timeframe by case type:

- **Felony:** 90 Days or Less, 91 to 180 Days, 181 to 365 Days, Over 365 Days, Total Cases.
- **Misdemeanor:** 30 Days or Less, 31 to 60 Days, 61 to 90 Days, Over 90 Days, Total Cases.
- **Civil:** 3 Months or Less, Over 3 to 6 Months, Over 6 to 12 Months, Over 12 to 18 Months, Over 18 Months, Total Cases.
- **Family:** 3 Months or Less, Over 3 to 6 Months, Over 6 to 12 Months, Over 12 to 18 Months, Over 18 Months, Total Cases.
- **Juvenile:** 30 Days or Less, 31 to 90 Days, 91 to 180 Days, Over 180 Days, Total Cases.
- **Probate and guardianship and ancillary cases:** 3 Months or Less, Over 3 to 6 Months, Over 6 to 12 Months, Over 12 to 18 Months, Over 18 Months, Total Cases.
- **Mental health commitments:** 7 Days or Less, 8 to 14 Days, 15 to 21 Days, 22 to 28 Days, Over 28 Days, Total Cases.

Most information **already reported** on Judicial Council Monthly Reports, except for data for probate, guardianship and mental health cases.

Age of Court's Active Pending Caseload Defined

For **each district or county-level court** in your jurisdiction, report the age of the active cases pending before the court as measured by the time from date of filing or reopening to the reporting end date (August 31).

- **Felony:** 90 Days or Less, 91 to 180 Days, 181 to 365 Days, Over 365 Days, Total Cases.
- **Misdemeanor:** 30 Days or Less, 31 to 60 Days, 61 to 90 Days, Over 90 Days, Total Cases.
- **Civil:** 3 Months or Less, Over 3 to 6 Months, Over 6 to 12 Months, Over 12 to 18 Months, Over 18 Months, Total Cases.
- **Family:** 3 Months or Less, Over 3 to 6 Months, Over 6 to 12 Months, Over 12 to 18 Months, Over 18 Months, Total Cases.
- **Juvenile:** 30 Days or Less, 31 to 90 Days, 91 to 180 Days, Over 180 Days, Total Cases.
- **Probate and guardianship and ancillary cases:** 3 Months or Less, Over 3 to 6 Months, Over 6 to 12 Months, Over 12 to 18 Months, Over 18 Months, Total Cases.
- **Mental health commitments:** 7 Days or Less, 8 to 14 Days, 15 to 21 Days, 22 to 28 Days, Over 28 Days, Total Cases.

Note: Timeframes are the same as those used for Age of Cases Disposed

Transfers Between Courts of the Same Level on the Annual Performance Measures Report

Transfers between courts at the same level in the county should be counted in the Annual Performance Measures Report to ensure that each court gets credit for the case, resulting in balanced clearance rates for each court.

Scenario: Case filed in January 2009 in District Court A
 Case transferred to District Court B in March 2009
 Case disposed by District Court B in May 2009

For reports by court:

- Filing counted for District Court A in January
- Transfer out counted as a disposition for District Court A in March
- Transfer in counted as case filing for District Court B in March
- Disposition counted for District Court B in May

This may require additional mapping and/or events created in your case management system to capture these transfers.

Transfers Between Courts of the Same Level on the Annual Performance Measures Report

Transfers get counted under filings and dispositions

- Number of cases **filed** (includes transfers between courts of the same level)
- Number of cases **disposed/adjudicated** (includes transfers between courts of the same level)

Transfers Between Courts of the Same Level on the Judicial Council Monthly Activity Report

Prior guidance for the countywide monthly Judicial Council Activity Reports remains the same:

- **Transfers between courts of the same type should not be counted on the statewide Judicial Council monthly report.** The report captures only the filing and ultimate disposition of a case.
- Transfers are to be counted only when a case is transferred to a different type of court (district court, statutory county court, or constitutional county court).

Scenario: Case filed in January 2009 in Court A
Case transferred to Court B in March 2009
Case disposed by Court B in May 2009

Transfers Between Courts of the Same Level

The transfer from Court A to Court B **will** be reported on the **Annual Performance Measures Report** but **not** on the **Judicial Council Monthly Activity Report**.

For Annual Performance Measures Report:

Filing counted for Court A in January
Transfer out counted for Court A in March
Transfer in counted for Court B in March
Disposition counted for Court B in May

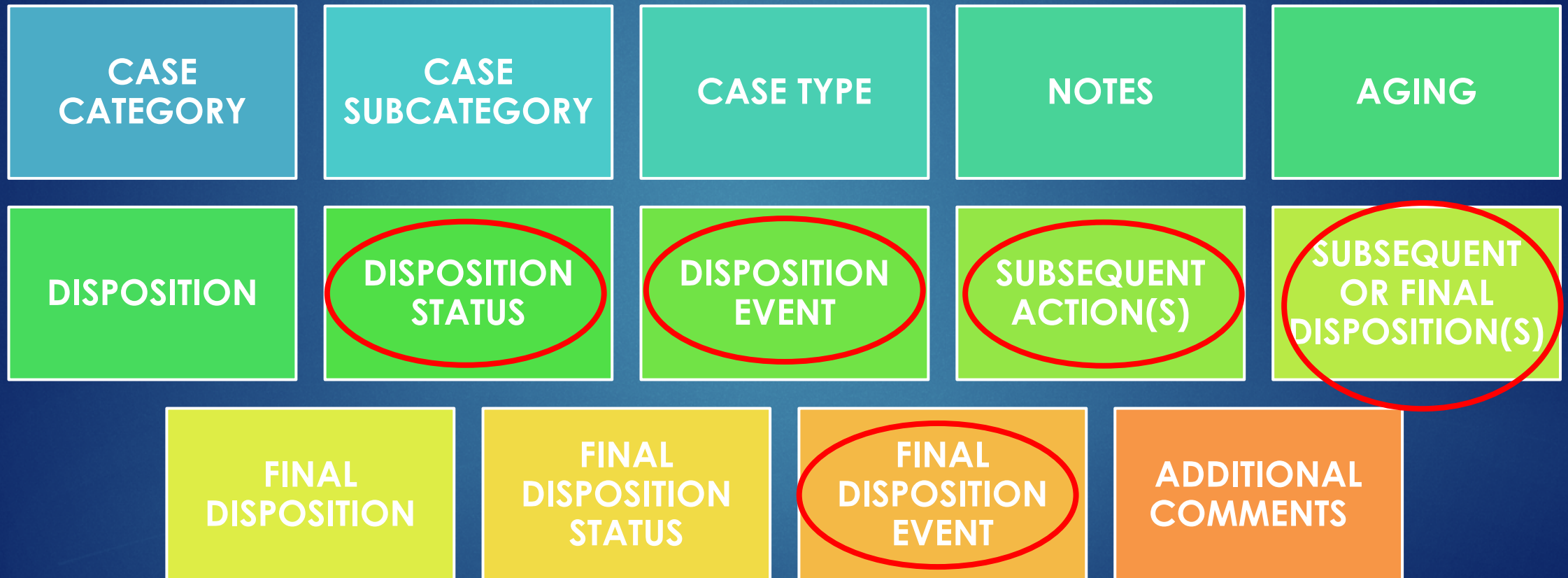
On Judicial Council Monthly Report:

Filing counted in January
Disposition counted in May

For counties that report information to OCA for individual courts, enter a docket adjustment in the month after the transfer is completed to correct the number of cases pending in each case category at the beginning of the month. You will subtract cases from the transferring court and add them to the receiving court(s).

<https://www.txcourts.gov/media/1459010/hb-2384-additional-guidance-aug-2024.pdf>

Probate & Mental Health Guidance



Probate and Mental Health Guidance Document

<https://district-county-court-level-reporting/performance-measures-for-district-county-courts-hb-2384>

District & County Court-Level Reporting

Site Search



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DISTRICT & COUNTY COURT- LEVEL REPORTING HOME

Counties Population Over 1 Million
Reporting (HB 1182)

**Performance Measures for District &
County Courts (HB 2384)**

PERFORMANCE MEASURES FOR DISTRICT & COUNTY COURTS (HB 2384)

Reporting Requirements

Section 72.083(b) of the Texas Government Code, added by HB 2384 (88th Legislature, Regular Session), requires the Office of Court Administration to annually collect and publish a report including performance measures for each district court, statutory county court, statutory probate court, and county court. All district, statutory, statutory probate, and county courts will be required to submit annual court level data for the completion of this annual report.

The report must include:

1. The court's clearance rate;
2. The average time a case is before the court from filing to disposition; and
3. The age of the court's active pending caseload.

The reporting timeframe for this report is defined as September 1 through August 31. One report will be submitted for each court for the year.

Reports must be submitted on an annual basis to the Data and Research Division by November 1. The first report will cover data from March 1, 2024, through August 31, 2024.

Reporting Instructions & Guidance Documents

[Reporting Instructions](#)

[Probate/Mental Health Guidance](#)

[Guidance on Transfers between Courts of the Same Level](#)

[Frequently Asked Questions](#)

Please send questions to judinfo@txcourts.gov.


Report Spreadsheets and Submission


Report Spreadsheets and Submission

Spreadsheet Instructions


1. Fill out the Excel spreadsheet(s) that corresponds to the court level(s) being reported, adding data as applicable. Do **NOT** edit the structure of the spreadsheet. Submissions with altered spreadsheets, e.g., added columns or altered column header text, will **not** be accepted.
2. Make sure the **Court Identifier** and **Court Name** match the format and text in the **Court Identifiers List**. Case Management System Vendors and local IT staff should reference the ~~Court Identifiers List~~ if file exports are developed in the CMS. **Fiscal Year** should be formatted as 20##.

[Court Identifiers List](#) 

[HB 2384 District Courts spreadsheet](#) 

[HB 2384 Statutory County Courts spreadsheet](#) 

[HB 2384 Statutory Probate County Courts spreadsheet](#) 

[HB 2384 Constitutional County Courts spreadsheet](#) 

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Submission

Please email your completed spreadsheet(s) to data.division@txcourts.gov.

BB	BC	BD	BE	BF	BG	BH	BI	BJ	BK	BL	BM	BN	BO	BP	BQ	BR	BS
Probate Active Pending Mar 1	Probate Cases Filed (Line 1 partial)	Probate Cases Reactivated (Line 2 a & b partial)	Probate Cases Disposed	Probate Cases Placed on Inactive Status	Probate Active Pending Aug 31	Probate AoC Disposed - 3 Months or Less	Probate AoC Disposed - Over 3 to 6 Months	Probate AoC Disposed - Over 6 to 12 Months	Probate AoC Disposed - Over 12 to 18 Months	Probate AoC Disposed - Over 18 Months	Probate AoC Disposed - Total	Probate Active Pending Aug 31 - 3 Months or Less	Probate Active Pending Aug 31 - Over 3 to 6 Months	Probate Active Pending Aug 31 - Over 6 to 12 Months	Probate Active Pending Aug 31 - Over 12 to 18 Months	Probate Active Pending Aug 31 - Over 18 Months	Probate Active Pending Aug 31 - Total
BT	BU	BV	BW	BX	BY	BZ	CA	CB	CC	CD	CE	CF	CG	CH	CI	CJ	CK
Mental Health Active Pending Mar 1	Mental Health Cases Filed (Line 1)	Mental Health Cases Reactivated	Mental Health Cases Disposed (Line 6 a & b)	Mental Health Cases Placed on Inactive Status	Mental Health Active Pending Aug 31	Mental Health AoC Disposed - 7 Days or Less	Mental Health AoC Disposed - 8 to 14 Days	Mental Health AoC Disposed - 15 to 21 Days	Mental Health AoC Disposed - 22 to 28 Days	Mental Health AoC Disposed - Over 28 Days	Mental Health AoC Disposed - Total	Mental Health Active Pending Aug 31 - 7 Days or Less	Mental Health Active Pending Aug 31 - 8 to 14 Days	Mental Health Active Pending Aug 31 - 15 to 21 Days	Mental Health Active Pending Aug 31 - 22 to 28 Days	Mental Health Active Pending Aug 31 - Over 28 Days	Mental Health Active Pending Aug 31 - Total

Probate and Guardianship Case Categories and Case Types

JUDICIAL COUNCIL MONTHLY COURT ACTIVITY REPORT

CASE CATEGORY	CASE SUB-CATEGORY	CASE TYPES TO INCLUDE
DECEDENTS' ESTATES	INDEPENDENT ADMINISTRATION	Probate of Will & Issuance of Letters Testamentary
		Independent Administration (EC 401.002(a))
		Independent Administration w/ Will Annexed (EC 401.002(b))
		Independent Administration (EC 401.003(b))
		Appt of Independent Administrator w/ Determination of Heirship (EC Ch. 202, 401.003)
	DEPENDENT ADMINISTRATION	Appt of Dependent Administrator
		Appt of Dependent Administrator w/ Will Annexed
		Probate Will, Dependent Executor
		Appt of Dependent Administration w/ Determination of Heirship
		Appt of Temporary Administrator

HB 2384 COURT PERFORMANCE MEASURES ANNUAL REPORT

CASE CATEGORY	CASE SUB-CATEGORY	CASE TYPES TO INCLUDE
DECEDENTS' ESTATES	INDEPENDENT ADMINISTRATION	Probate of Will & Issuance of Letters Testamentary
Same		Independent Executor w/ Will (EC 401.002(a))
Same		Independent Administration w/ Will Annexed (EC 401.002(b))
≠		Not reported as a separate case type
Same		Independent Administration w/ Determination of Heirship (EC Ch. 202, 401.003)
Same	DEPENDENT ADMINISTRATION	Application for Letters of Administration (EC Ch. 301)
Same		Application for Letters of Administration w/ Will Annexed (EC 306.002)
Same		Probate Will and Dependent Executor (EC Ch. 256, 301-362)
Same		Dependent Administration w/ Determination of Heirship (EC Ch. 202, Ch. 301-362)
Same		Temporary Administration (EC 452)

Probate and Guardianship Case Categories and Case Types

JUDICIAL COUNCIL MONTHLY COURT ACTIVITY REPORT		HB 2384 COURT PERFORMANCE MEASURES ANNUAL REPORT	
ALL OTHER ESTATE PROCEEDINGS	Muniment of Title (Ch. 257)	Same	ALL OTHER ESTATE PROCEEDINGS Probate of Will as Muniment of Title (EC Ch. 257)
<i>This case type should be reported under GUARDIANSHIP category, ALL OTHER CASES sub-category</i>	Sale of Minor's Property Without Guardianship (Ch. 1351, Subchap. A)	\neq	This case type is reported under GUARDIANSHIP category, ALL OTHER CASES sub-category
<i>This case type should be listed under GUARDIANSHIP category, ALL OTHER CASES sub-category</i>	Payment of Claims w/o Administration for Minor or Incapacitated Person (Ch. 1355)	\neq	This case type is reported under GUARDIANSHIP category, ALL OTHER CASES sub-category
	Determination of Heirship w/o Administration (Ch. 202)	Same	Determination of Heirship (No Administration) (EC Ch. 202)
	Small Estates (Ch. 205)	Same	Small Estate Affidavit (EC Ch. 205)
	Complaint to Produce Will (Sec. 252.201)	Same	Complaint to Produce Will (EC 252.202)
<i>This case type on the Judicial Council Monthly Court Activity Report is split into two different case types on the HB 2384 Performance Measures Report. Note: The reference to Ch. 502 is not a separate case type from probate of a Will under EC Ch. 256.</i>	Probate of Foreign Will (Ch. 501, 502)		Probate of Foreign Will (No Letters) (EC Ch. 501)
			Probate of Foreign Will w/ Ancillary Letters Testamentary (EC Ch. 501, Sec. 501.006)
	Order to Examine Documents or Open Safety Deposit Box (Ch. 151)	Same	Open Safety Deposit Box or Examine Documents (EC Ch. 151)
	Emergency Intervention (Ch. 152)	Same	Emergency Intervention (EC Ch. 152)
	Order to Access Intestate's Financial Account Information (Ch. 153)	Same	Access Intestate's Financial Acct Information (EST Ch. 153)

Probate and Guardianship Case Categories and Case Types

JUDICIAL COUNCIL MONTHLY COURT ACTIVITY REPORT			HB 2384 COURT PERFORMANCE MEASURES ANNUAL REPORT		
GUARDIANSHIPS	GUARDIANSHIP - MINOR		GUARDIANSHIPS	GUARDIANSHIP - MINOR	
		Appt Guardian for Person Only (Minor)	Same		Guardianship of the Person (EC Title 3)
		Appt Guardian for Estate Only (Minor)	Same		Guardianship of the Estate (EC Title 3)
		Appt of Guardian for Person and Estate (Minor)	Same		Guardianship of the Person and Estate (EC Title 3)
		Appt Temp Guardian for Person Only (Minor)	Same		Temporary Guardianship of the Person (EC Ch. 1251)
		Appt Temp Guardian for Estate Only (Minor)	Same		Temporary Guardianship of the Estate (EC Ch. 1251)
		Appt Temp Guardian for Person and Estate (Minor)	Same		Temporary Guardianship of the Person and Estate (EC Ch. 1251)
		Appt of Guardian for Minor Ward to Receive Government Funds (Sec. 1151.251)	Same		Appointment of Guardian of Minor to Receive Gov't. Funds (EC Ch. 1151, Subch. F)
		Interstate Guardianship (Minor) (Ch. 1253)	Same		Interstate Guardianship (EC Ch. 1253)
		Management Trust (Minor) (Ch. 1301)	Same		Management Trust (Minor) (EC Ch. 1301)
		Non-Resident Ward (Minor) (Ch. 1252)	Same		Nonresident Ward (Minor) (EC Ch. 1252)
		Sale of Ward's Property without Guardianship of Estate but with Guardianship of Person (Minor) (Ch. 1351, Subchap. B)	Same		Sale of Ward's Property Without Guardianship of the Estate (EST Ch. 1351, Subchap. B)
	GUARDIANSHIP - ADULT		Same	GUARDIANSHIP - ADULT	
		Appt Guardian for Person Only (Adult)	Same		Guardianship of the Person (EC Title 3)
		Appt Guardian for Estate Only (Adult)	Same		Guardianship of the Estate (EC Title 3)
		Appt of Guardian for Person and Estate (Adult)	Same		Guardianship of the Person and Estate (EC Title 3)

Probate and Guardianship Case Categories and Case Types

JUDICIAL COUNCIL MONTHLY COURT ACTIVITY REPORT			HB 2384 COURT PERFORMANCE MEASURES ANNUAL REPORT		
GUARDIANSHIPS	GUARDIANSHIP - ADULT (cont'd.)	Appt Temp Guardian for Person Only (Adult)	← Same →		Temporary Guardianship of the Person (EC Ch. 1251)
		Appt Temp Guardian for Estate Only (Adult)	← Same →		Temporary Guardianship of the Estate (EC Ch. 1251)
		Appt Temp Guardian for Person and Estate (Adult)	← Same →		Temporary Guardianship of the Person and Estate (EC Ch. 1251)
		Appt of Guardian for Adult Ward to Receive Government Funds (Sec. 1151.251)	← Same →		Appointment of Guardian of Incapacitated Adult to Receive Gov't. Funds (EC Ch. 1151, Subch. F)
		Interstate Guardianship (Adult) (Ch. 1253)	← Same →		Interstate Guardianship (EC Ch. 1253)
		Management Trust (Adult) (Ch. 1301)	← Same →		Management Trust (Incapacitated Adult) (EC Ch. 1301)
		Non-Resident Ward (Adult) (Ch. 1252)	← Same →		Nonresident Ward (Incapacitated Adult) (EC Ch. 1252)
		Incapacitated Spouse (Ch. 1353)	← Same →		Management of Incapacitated Spouse's Property (EST Ch. 1353)
		Sale of Ward's Property without Guardianship of Estate but with Guardianship of Person (Minor) (Ch. 1351, Subchap. B)	← Same →		Sale of Ward's Property Without Guardianship of the Estate (EST Ch. 1351, Subchap. B)
	ALL OTHER CASES		≠	ALL OTHER CASES	Sale of Minor's Property w/o Guardianship (EC Ch. 1351, Subch. A)
			≠	These 2 case types are listed under the correct Category and Sub-Category	Payment of Claims w/o Guardianship (Minor or Incapacitated Adult) (EC Ch. 1355)
		Application for Mineral Lease	← Same →		Application for Mineral Lease (EC Ch. 1160)
		Contracts of Minors (Ch. 1356)	← Same →		Contracts of Minors (EST Ch. 1356)

Probate and Guardianship Case Categories and Case Types

JUDICIAL COUNCIL MONTHLY COURT ACTIVITY REPORT		HB 2384 COURT PERFORMANCE MEASURES ANNUAL REPORT	
ALL OTHER CASES (cont'd.)	Delayed Birth or Death Certificate	Same	Delayed Birth or Death Certificate (HSC Ch. 192, Subch. B; Sec. 193.007)
	Mortgage of Minor's Interest in Residence Homestead (Ch. 1352)	Same	Mortgage of Minor's Interest in Residence Homestead (EST Ch. 1352)
	Receivership, Minor or Incapacitated Adult (Ch. 1354)	Same	Receivership (Minor or Incapacitated Adult) (EST Ch. 1354)
	Relief from Firearms Disability Related to Guardianship Case	Same	Relief from Firearms Disability (EST 1202.201)
	Trusts	Same	Trusts (EC Ch. 1301-1302; Property Code, Title 9-10)

Subsequent Actions in Probate Court

- Any “action” other than the original action initiating the case in which the movant seeks affirmative relief, including contests, adverse actions, interpleaders, third party actions, etc.
- NOTE:** Does not include motions, applications, accountings or reports that are an inherent part of the administration or guardianship that was the subject of the original action, e.g., annual reports/accountings filed in guardianships, etc.
- Be careful about equating a “subsequent action” that is subject to the reporting requirements with a subsequent action that is subject to the subsequent action filing fees prescribed under Local Government Code, §§ 133.151(a)(2), 135.102(a)(2).*

Dispositions in Probate and Guardianship Cases

- For purposes of the HB 2384 Performance Measures Report, the disposition of any pending “action” must be reported as a “disposition” even though the case may remain open and the administration of the estate or guardianship continued.
- Scenario:
 - ▶ Application for Probate of Will is filed – report as “case filed” (activating event)
 - ▶ Order Admitting Will to Probate is entered by the court –
 - Muniment of Title – Report order as “disposition”. Unless an application for administration is filed later under Estates Code, Sec. 257.151, this will be the **final disposition**, and the case may be closed in the case management system.
 - Letters Granted – Report order as “disposition” of the initial application; however, this will not necessarily be the **final disposition** of the case, so it should remain open.
 - ▶ Application for sale of real property is later filed by the administrator – **report** as “subsequent action” but do not assess subsequent action filing fees under Local Government Code, Sec. 133.151(a)(2) and Sec. 135.102(a)(2), because there is a prescribed filing fee under Local Government Code, Sec. 118.052(2)(A)(v).
 - ▶ Order Approving Sale of Real Property is entered and disposes of the subsequent action.



- ▶ Instructions and Guidance Documents are designed to assist with reporting at the clerk level. We are constantly updating our information and FAQ's to assist. Go to: <https://www.txcourts.gov/>
- ▶ If you have further questions please email:
JudInfo@txcourts.gov

