



January 11, 2020

To: Public Defense Partners

From: Kimber Sexton, Senior Policy Analyst

Heather Pate, Contracts Manager

Eric Deitrick, General Counsel

Re: Caseload Reporting for Non-PCRP

OPDS has created a new submission platform for caseload reporting for Non-PCRP attorneys. This change will not only create an online submission form but also a database that captures all of the reported information enabling OPDS to collect, analyze and report data in a meaningful way.

Caseload reporting is due monthly on the 20th of the month following the reporting period (1st-31st of the previous month). The report should contain all cases that were open during the reporting period. The first submission will be due February 20, 2021 for the January reporting period. The link on our website will be available February 16, 2021.

We have created an online form for submission to which you will attach the file with the case detail. The file attached will need to be submitted as a Comma delimited (.csv) file.

1. Once your Excel document is ready just click Save As, name the file, then choose Comma delimited (*.csv) from the drop-down menu for file type, click save and choose a local location for storage.
2. Next you will go to <https://www.oregon.gov/opds/provider/Pages/case-load.aspx>. Click on the link for the submittal form, enter submitter information, attach your .csv file and click submit.
3. You will receive an email within one hour either confirming the successful submission or one that indicates there is an error.

The system will validate the .csv file to ensure that the required columns, format and information are included. OPDS historically received files with different formats and information. It will be required that the columns are in the order below. The information in the columns with **green headers are required**, the others are optional.

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EXAMPLE CSV File: (Note the format above the header is informational and not part of your document)

Text	Text	Text	Text	Text	Text	Text	xx/xx/xxxx	Text	Text	Text	Text	xx/xx/xxxx	Text	Text
County	Client Last Name	Client First Name	Case Number	Case Name	Case Type	Charge	Incident Date	ORS	Assigned Attorney OSB	Attorney Last Name	Attorney First Name	Appointment Date	Petition Number	Comments
Benton	Jones	Tom	20CR49793	State v Jones	BFEL	Aggravated Theft	1/2/2020	164.057	123456	Masonery	Perrie	12/3/2020		
Baker	Longfellow	Henry	10CR19094	Smith v Wesson	CFEL	Identity Theft	3/3/2010	165.8	654321	Matlocke	Benny	12/7/2020	17.3	

There is a new second part of the process requiring attorney validation of their caseload. On the 25th of each month an email will be sent to each attorney listing the cases reported and a validation code. It is the responsibility of the attorney to review and assert via submission of the validation code that the report is a true, accurate, and complete list of the attorney's open cases in the previous month. Validation will be due the 28th of each month.

1. Once the list of submitted cases has been reviewed and is deemed accurate just click on the link in the email to submit the validation code. Complete the form by entering your Oregon State Bar number and the validation code and click submit.
2. If omissions or errors are found simply forward the email to both the original submitter and Case.Load.Reporting@opds.state.or.us detailing the error(s).
3. Once corrections have been submitted you will receive a new validation email.

If you have any questions or need assistance please send an email to Case.Load.Reporting@opds.state.or.us and we will be happy to assist you.

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