



February 19, 2021

To: Public Defense Partners
From: Kimber Sexton, Senior Policy Analyst
Heather Pate, Contracts Manager
Eric Deitrick, General Counsel
Re: Case Load Reporting Non-PCR

Dear Public Defense Provider Community:

We are receiving reports successfully!

Although we have encountered some technical issues with the new database, report submissions have not been affected. You will receive an email confirming we have successfully received files submitted. We will continue to evaluate the files submitted for format and content errors, but there may be a delay in sending further follow-up emails to request necessary corrections and resubmission. We appreciate your patience as we navigate these changes. In addition, individual attorney validation is not required this month. We will begin that process in March for the February reporting period.

We understand that there are necessary changes to your processes that require time and effort. If you are unable to submit your report by February 20th, please send an email to case.load.reporting@opds.state.or.us and let us know when you anticipate you will be able to do so.

You can find the link to the online submittal form and a template .csv at <https://www.oregon.gov/opds/provider/Pages/case-load.aspx>. **Reports will not be accepted via email.**

Please see the following clarifications, as well as the attached FAQ sheet in response to actual questions we've received, organized by category for your convenience. Note: We have included the previous FAQ questions and answers in blue.

Please direct any questions to case.load.reporting@opds.state.or.us.

Oregon Office of Public Defense Services

Contracts and Business Services

198 Commercial St. SE, Suite 205, Salem, OR 97301 • 503.378.2478 • www.oregon.gov/opds

REPORTING

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

Please note that you must select either *Attorney* or *Administrator* on the form. If you are an Administrator, you do not need to enter an Oregon State Bar number on the form, and you should submit one file containing data for all associated attorneys open cases. If you are an Attorney, you do need to enter your Oregon State Bar number and submit one file containing data for your open cases.

Please only submit one report during a reporting period. Submission of more than one report for a reporting period (month) will create an error.

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

CLARIFICATION: CASELOAD vs WORKLOAD

What is the difference between caseload and workload and how does that affect my case count for the 2021 contract?

The 2021 contracts were created around a “caseload” model, which means each contractor has agreed that each attorney working on the contract will receive a set number of case assignments during the contract period (January 1, 2021 and December 31, 2021). Stated simply, the contract requires a number of appointments per year.

To better understand the implications of this model, we ask that contractors also track and report their *workload*. “Workload” is defined as a total accounting of their open cases. An individual attorneys’ workload will have no bearing on their 2021 caseload obligation. However, this data will provide us with valuable insight to the actual number of cases an attorney has open, how long it takes to resolve cases, and much more that will allow us to make data-informed decisions in the future.

➔ **Key takeaway:** Workload refers to the number of open cases and will be used for oversight and data collection. Caseload refers to the cases received during the contract cycle and will be used to calculate FTE.

APPELATE CASELOAD REPORTING

Please do not report appellate cases using this form. A form specific to appellate cases is being developed. We will keep you updated.

CASELOAD DETAIL FILE

The caseload detail file should contain all open non-PCRPP public defense cases for the reporting period. For example, if a case is appointed in January and remains open until June 20 it should be reported on the January through June submissions.

The caseload detail file must be in .csv format and contain all columns, in the same order and with exact header names as shown in the template (<https://www.oregon.gov/opds/provider/Pages/case-load.aspx>). There is information that is required and some that is optional (see below).

County	Client Last Name	Client First Name	Case Number	Most Serious Case Type	Most Serious Charge	Most Serious Incident Date	ORS	Appointment Date	Assigned Attorney OSB	Attorney Last Name	Attorney First Name	Complex Case	Comments
Required	Required	Required	Required	Required	Required	Required	Required	Required	Required	Optional	Optional	Optional	Optional

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