

How to Run Reports for the Caseload Survey

How many (COURT TYPE) cases did you open (begin work on) during the reporting period?

1. Reports
2. All Cases Opened
3. Fill in:
 1. Date Opened: enter the start and end date of the current reporting period
 2. Attorney
 3. County
 4. Court Type (District or Justice Court, see below for juvenile delinquency and parental representation instructions)
4. Run
5. Total case count will be at the bottom of the PDF page

14 - All Cases Opened

Case Type	<input type="text"/>	Note Search:	<input type="text"/>	Gender:	<input type="text"/>
Date Opened:	07/01/2020 12/31/2020	County:	Salt Lake	Ethnicity:	<input type="text"/>
Attorney:	Howitt, Leslie	Flag	<input type="text"/>	Export Type:	PDF
Current Status:	<input type="text"/>	Court Type:	Justice Court		

NOTE: Since juvenile delinquency and parental defense are frequently run out of the same courts with the same judges, the following instructions will work better for those case counts:

1. Follow all directions above except:
2. Leave Court Type blank and instead multi-select all relevant case types for the court type
 - i. Click the arrow next to case type, click "Switch" or "Multi-Select"

Case Type |

Date Opened:

Attorney: A1 Appeals - Level 1

Current Status: A2 Appeals - Level 2

APP Appeal

BEC Status Offenses (ARY/CHINS)

Report Name CCV Community Corrections Violation

Active Case List with CHI Child Rep Dependency

Switch

- ii. Click all relevant case types for the court you're running the report on (juvenile delinquency or parental defense). They will highlight in blue.

14 - All Cases Opened

Case Type: [Dropdown]

Date Opened: [OK] [Cancel] [All] [Clear] [Switch]

Attorney: [INF] Infraction

Current Status: [JPV] Juvenile Probation Violation

Report Name: [JVL] Juvenile

Active Case List with [MIS] Misdemeanor

All Cases Appointed [NON] Non Charge Representation

[OTR] Other

iii. Click "ok"

14 - All Cases Opened

Case Type: [JVL - Juvenile, JPV - Juvenile Prob] Note Se

Date Opened: [OK] [Cancel] [All] [Clear] [Switch] ty:

Attorney: [JPV] Juvenile Probation Violation Flag

Current Status: [JVL] Juvenile Court T

Report Name: [MIS] Misdemeanor

Active Case List with [NON] Non Charge Representation

All Cases Appointed [OTR] Other with Future Ev

[PRP] Personal Restraint Petition ed

3. Run

4. Total case count will be at the bottom of the PDF page

14 - All Cases Opened

Case Type: [JVL - Juvenile, JPV - Juvenile Prob] Note Search: [Text Box] Gender: [Dropdown]

Date Opened: [07/01/2020] [12/31/2020] County: [Salt Lake] Ethnicity: [Dropdown]

Attorney: [Howitt, Leslie] Flag: [Dropdown] Export Type: [PDF]

Current Status: [Dropdown] Court Type: [Dropdown]

How many (COURT TYPE) cases did you have open during this reporting period that were opened in a previous reporting period?

You will need to run two reports to answer this question and then sum the cases from those two reports. I apologize for this; we're working with defenderData to condense this into one report.

Report 1: All cases opened in a previous reporting period and still open

1. Reports
2. Cases by Attorney
3. Fill in:

- a. Date Opened: enter the end date of the *previous* reporting period
 - b. Attorney
 - c. County
 - d. Court Type (see directions below for juvenile delinquency and parental defense)
 - e. Current Status: enter “Open/Active”
4. Run
 5. Total case count will be at the bottom of the PDF page

24 - Cases By Attorney

Attorney:	<input type="text" value="Howitt, Leslie"/>	(Includes Case Team Attorneys)	Current Status:	<input type="text" value="Open/Active"/>	
Case Type:	<input type="text"/>	County:	<input type="text" value="Salt Lake"/>	Export Type:	<input type="text" value="PDF"/>
Date Opened:	<input type="text" value="06/30/2020"/>	Flag:	<input type="text"/>		
Date Closed:	<input type="text"/>	Court Type:	<input type="text" value="Justice Court"/>		

Report 2: All cases opened in a previous reporting period and closed during the current reporting period

In the same reporting screen, clear “Open/Active” from Current Status, leaving it blank. Add Date Closed as the starting and ending dates of the current reporting period. If starting from scratch, use the following instructions:

1. Reports
2. Cases by Attorney
3. Fill in:
 - a. Date Opened: enter the end date of the *previous* reporting period
 - b. Date Closed: enter the start and end date of the *current* reporting period
 - c. Attorney
 - d. County
 - e. Court Type- (see directions below for juvenile delinquency and parental defense)
4. Run
5. Total cases will be at the bottom of the PDF page

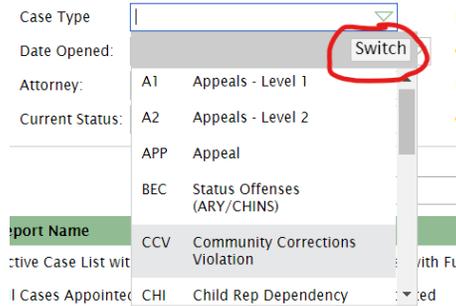
24 - Cases By Attorney

Attorney:	<input type="text" value="Howitt, Leslie"/>	(Includes Case Team Attorneys)	Current Status:	<input type="text"/>	
Case Type:	<input type="text"/>	County:	<input type="text" value="Salt Lake"/>	Export Type:	<input type="text" value="PDF"/>
Date Opened:	<input type="text" value="06/30/2020"/>	Flag:	<input type="text"/>		
Date Closed:	<input type="text" value="07/01/2020"/> <input type="text" value="12/31/2020"/>	Court Type:	<input type="text" value="Justice Court"/>		

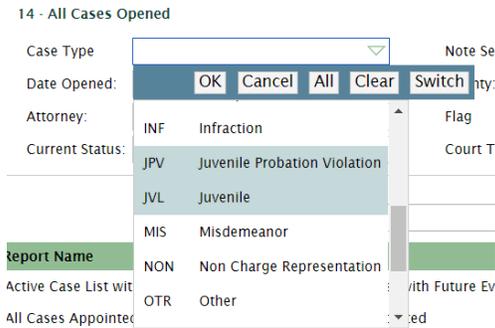
Sum the total cases from Report 1 and Report 2 and enter it into the Caseload Survey.

NOTE: Since juvenile delinquency and parental defense are frequently run out of the same courts with the same judges, the following instructions will work better for those case counts:

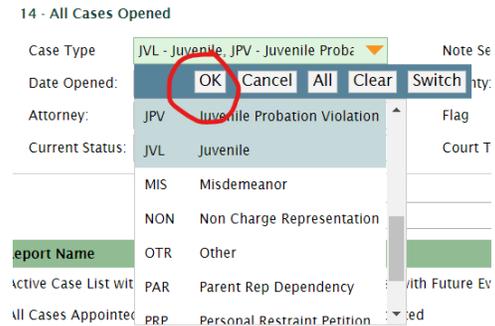
1. Follow all directions above except:
2. Leave Court Type blank and instead multi-select all relevant case types for the court type
 - i. Click the arrow next to case type, click “Switch” or “Multi-Select”



- ii. Click all relevant case types for the court you’re running the report on (juvenile delinquency or parental defense). They will highlight in blue.



- iii. Click “ok”



3. Run
4. Total case count will be at the bottom of the PDF page

