

# Performance Measures Reporting

88<sup>TH</sup> LEGISLATIVE SESSION - HB 2384

TEXAS OFFICE OF COURT ADMINISTRATION

DATA & RESEARCH DIVISION



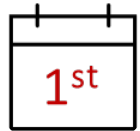
# HB 2384- Report Requirements & Information



Frequency: **Annually**



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



Due Date: **November 1st**



Submission: **Excel template**  
To: **[data.division@txcourts.gov](mailto: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

Home / Judicial Data / Reporting to OCA

### 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](mailto: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](mailto:data.division@txcourts.gov).

# HB 2384 Report Requirements & Information

# HB 2384 – Annual Performance Measures Report by Court

- ▶ Requires clerks to submit annual data for **each** district court, statutory county court, statutory probate court, and county court
- ▶ Requires OCA to collect and publish a report annually for **each** court, to include the following:
  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.

# Clearance Rate Defined

- ▶ OCA will calculate the clearance rate from the information submitted
- ▶ Clerks will **NOT** need to calculate clearance rates

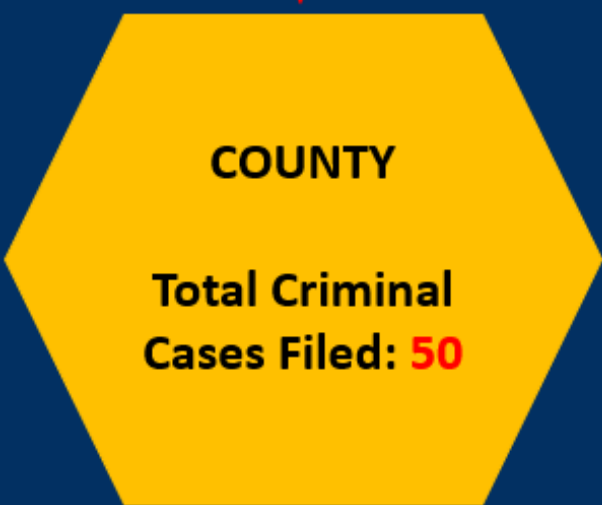
- ▶ Clearance Rate =  
Cases **disposed or adjudicated** + Cases placed on **inactive** status  
Divided by  
Cases **filed** + Cases **reactivated**

# Report

1. Number of **active pending** cases as of March 1 (subsequent September)
  2. Number of cases **filed** during the year
  3. Number of cases **reactivated** during the year
  4. Number of cases **disposed or adjudicated** (juvenile) during the year
  5. Number of cases placed on **inactive** status during the year
  6. 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

# 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
<b>Cases Pending 2/1/2024:</b>									
Active Cases									
Inactive Cases									
Docket Adjustments	0	0	0	0	0	0	0	0	0
<b>Cases Added:</b>									
Filed by Indictment or Information									
Other Cases Reaching Docket:									
Motions to Revoke Filed									
Cases Reactivated									
All Other Cases Added									
<b>Total Cases on Docket:</b>									



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 Beginning of Period (Line 1a)	Felony Cases Filed (Add Lines 2,3,5 for total)	Felony Internal Transfers In (NEW)	Felony Cases Reactivated (Line 4)	Felony Cases Disposed (Line 7)	Felony Internal Transfers Out (NEW)	Felony Cases Placed on Inactive Status (Line 8)	Felony Active Pending End of Period (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 End of Period - 90 Days or Less	Felony Active Pending End of Period - 91 to 180 Days	Felony Active Pending End of Period - 181 to 365 Days	Felony Active Pending End of Period - Over 365 Days	Felony Active Pending End of Period - Total (Line 9a)
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Misdemeanor Active Pending Beginning of Period (Line 1a)	Misdemeanor Cases Filed (Add Lines 2,3,5 for total)	Internal Transfers In (NEW)	Misdemeanor Cases Reactivated (Line 5)	Misdemeanor Cases Disposed (Line 8)	Internal Transfers Out (NEW)	Misdemeanor Cases Placed on Inactive Status (Line 9)	Misdemeanor Active Pending End of Period (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 End of Period - 30 Days or Less	Misdemeanor Active Pending End of Period - 31 to 60 Days	Misdemeanor Active Pending End of Period - 61 to 90 Days	Misdemeanor Active Pending End of Period - Over 90 Days	Misdemeanor Active Pending End of Period - Total (Line 10a)
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Civil Active Pending Beginning of Period (Line 1a)	Civil Cases Filed (Add Lines 2,3 for total)	Internal Transfers In (NEW)	Civil Cases Reactivated (Line 3)	Civil Cases Disposed (Line 6)	Internal Transfers Out (NEW)	Civil Cases Placed on Inactive Status (Line 7)	Civil Active Pending End of Period (Line 9a)	Civil AoC Disposed - 3 Months or Less (Line 9)	Civil AoC Disposed - Over 3 to 6 Months (Line 9)	Civil AoC Disposed - Over 6 to 12 Months (Line 9)	Civil AoC Disposed - Over 12 to 18 Months (Line 9)	Civil AoC Disposed - Over 18 Months (Line 9)	Civil AoC Disposed - Total (Line 9)	Civil Active Pending End of Period - 3 Months or Less	Civil Active Pending End of Period - Over 3 to 6 Months	Civil Active Pending End of Period - Over 6 to 12 Months	Civil Active Pending End of Period - Over 12 to 18 Months	Civil Active Pending End of Period - Over 18 Months	Civil Active Pending End of Period - Total (Line 9a)
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Family Active Pending Beginning of Period (Line 1a)	Family Cases Filed (Add Line 2 & 4 for total)	Internal Transfers In (NEW)	Family Cases Reactivated (Line 3)	Family Cases Disposed (Line 6)	Internal Transfers Out (NEW)	Family Cases Placed on Inactive Status (Line 7)	Family Active Pending End of Period (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 End of Period - 3 Months or Less	Family Active Pending End of Period - Over 3 to 6 Months	Family Active Pending End of Period - Over 6 to 12 Months	Family Active Pending End of Period - Over 12 to 18 Months	Family Active Pending End of Period - Over 18 Months	Family Active Pending End of Period - Total (Line 8a)
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Juvenile Active Pending Beginning of Period (Line 1a)	Juvenile Cases Filed (Add Line 2,3,4,6 for total)	Internal Transfers In (NEW)	Juvenile Cases Reactivated (Line 5)	Juvenile Cases Disposed (Line 8)	Internal Transfers Out (NEW)	Juvenile Cases Placed on Inactive Status (Line 9)	Juvenile Active Pending End of Period (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 End of Period - 30 Days or Less	Juvenile Active Pending End of Period - 31 to 90 Days	Juvenile Active Pending End of Period - 91 to 180 Days	Juvenile Active Pending End of Period - Over 180 Days	Juvenile Active Pending End of Period - Total (Line 10a)
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# 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

# Exchange of Benches

**Guidance** remains the same no matter whether the exchange occurs between judges from different court levels or the same level:

- Statistics should be reported for the **COURT**, not a particular judge.
  - If District Judge Joe Smith sits on the bench of the County Court at Law, the cases that Judge Smith disposed of are counted to the County Court at Law.
  - If County Court at Law Judge April Jones sits on the bench of the District Court, the cases that Judge Jones disposed of are counted to the District Court.
  - If County Court at Law Judge April Jones sits on the bench of the County Court, the cases that Judge Jones disposed of are counted to the County Court.
  - If District Judge Joe Smith (47<sup>th</sup> District) sits on the bench of the 108<sup>th</sup> District Court, the cases that Judge Smith disposed of are counted to the 108<sup>th</sup>.

# 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 in District Court A  
                    Case transferred to District Court B in March  
                    Case disposed by District Court B in May

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 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 in Court A  
Case transferred to Court B in March  
Case disposed by Court B in May

# 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:

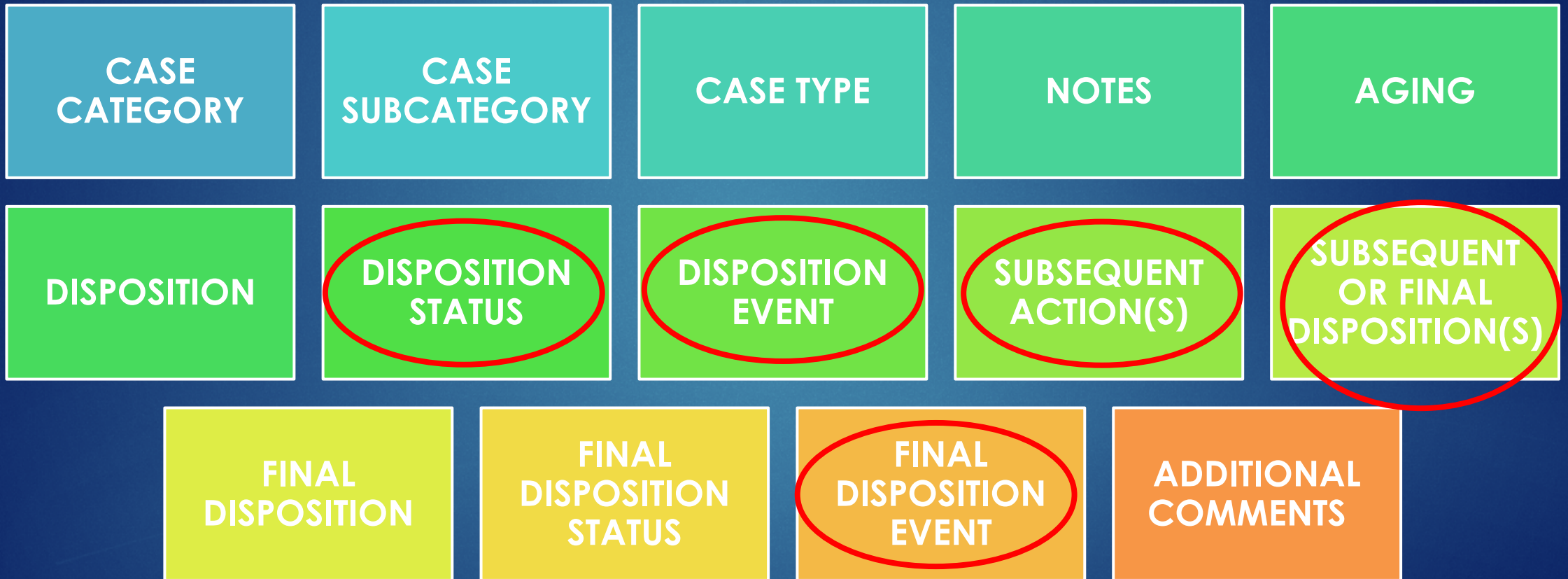
Filing counted in January  
Disposition counted in May

<https://www.txcourts.gov/media/1459039/guidance-on-transfers-between-courts.pdf>

Questions???



# 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



Home / Judicial Data / Reporting / District & County Court-Level Reporting / Performance Measures for District & County Courts (HB 2384)

### 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](mailto: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](mailto: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

## HB 2384 COURT PERFORMANCE MEASURES ANNUAL REPORT

CASE CATEGORY	CASE SUB-CATEGORY	CASE TYPES TO INCLUDE	CASE CATEGORY	CASE SUB-CATEGORY	CASE TYPES TO INCLUDE
DECEDENTS' ESTATES	INDEPENDENT ADMINISTRATION	Probate of Will & Issuance of Letters Testamentary	DECEDENTS' ESTATES	INDEPENDENT ADMINISTRATION	Probate of Will & Issuance of Letters Testamentary
		Independent Administration (EC 401.002(a))	← Same →		Independent <b>Executor</b> w/ Will (EC 401.002(a))
		Independent Administration w/ Will Annexed (EC 401.002(b))	← Same →		Independent Administration w/ Will Annexed (EC 401.002(b))
	<i>Note that an Independent administration of intestate estate CANNOT be granted without a prior heirship judgment (EC 401.003(b)).</i>	Independent Administration (EC 401.003(b))	≠	<del></del>	<i>Not reported as a separate case type</i>
		Appt of Independent Administrator w/ Determination of Heirship (EC Ch. 202, 401.003)	← Same →		Independent Administration w/ Determination of Heirship (EC Ch. 202, 401.003)
DEPENDENT ADMINISTRATION		Appt of Dependent Administrator	← Same →	DEPENDENT ADMINISTRATION	Application for Letters of Administration (EC Ch. 301)
		Appt of Dependent Administrator w/ Will Annexed	← Same →		Application for Letters of Administration w/ Will Annexed (EC 306.002)
		Probate Will, Dependent Executor	← Same →		Probate Will and Dependent Executor (EC Ch. 256, 301-362)
		Appt of Dependent Administration w/ Determination of Heirship	← Same →		Dependent Administration w/ Determination of Heirship (EC Ch. 202, Ch. 301-362)
		Appt of Temporary Administrator	← 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)	≠	<del>Probate of Will as Muniment of Title (EC Ch. 257)</del> <i>This case type is reported under GUARDIANSHIP category, ALL OTHER CASES sub-category</i>
<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)	≠	<del>Probate of Will as Muniment of Title (EC Ch. 257)</del> <i>This case type is reported under GUARDIANSHIP category, ALL OTHER CASES sub-category</i>
	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)		<i>Same</i>		Guardianship of the Person (EC Title 3)
	Appt Guardian for Estate Only (Minor)		<i>Same</i>		Guardianship of the Estate (EC Title 3)
	Appt of Guardian for Person and Estate (Minor)		<i>Same</i>		Guardianship of the Person and Estate (EC Title 3)
	Appt Temp Guardian for Person Only (Minor)		<i>Same</i>		Temporary Guardianship of the Person (EC Ch. 1251)
	Appt Temp Guardian for Estate Only (Minor)		<i>Same</i>		Temporary Guardianship of the Estate (EC Ch. 1251)
	Appt Temp Guardian for Person and Estate (Minor)		<i>Same</i>		Temporary Guardianship of the Person and Estate (EC Ch. 1251)
	Appt of Guardian for Minor Ward to Receive Government Funds (Sec. 1151.251)		<i>Same</i>		Appointment of Guardian of Minor to Receive Gov't. Funds (EC Ch. 1151, Subch. F)
	Interstate Guardianship (Minor) (Ch. 1253)		<i>Same</i>		Interstate Guardianship (EC Ch. 1253)
	Management Trust (Minor) (Ch. 1301)		<i>Same</i>		Management Trust (Minor) (EC Ch. 1301)
	Non-Resident Ward (Minor) (Ch. 1252)		<i>Same</i>		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)		<i>Same</i>		Sale of Ward's Property Without Guardianship of the Estate (EST Ch. 1351, Subchap. B)
<b>GUARDIANSHIP - ADULT</b>	Appt Guardian for Person Only (Adult)		<i>Same</i>	<b>GUARDIANSHIP - ADULT</b>	Guardianship of the Person (EC Title 3)
	Appt Guardian for Estate Only (Adult)		<i>Same</i>		Guardianship of the Estate (EC Title 3)
	Appt of Guardian for Person and Estate (Adult)		<i>Same</i>		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)	
		<del>ALL OTHER CASES</del>	<del></del>	≠	ALL OTHER CASES	Sale of Minor's Property w/o Guardianship (EC Ch. 1351, Subch. A)
		<del></del>	<del></del>		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 FAQs to assist. Go to: <https://www.txcourts.gov/>
- ▶ If you have further questions, please email: [JudInfo@txcourts.gov](mailto:JudInfo@txcourts.gov)



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