

# MSJ REPORT WORKBOOK INSTRUCTIONS

The MSJ Report Workbook is an optional tool provided by the Office of Court Administration to assist clerks with collecting the necessary compliance elements and producing the Motion for Summary Judgment Report for each quarter. Formulas are used to produce the due dates and compliance assessments in the MSJ Report Worksheet and the MSJ Report Totals based on the information entered in the MSJ Report Worksheet by the user. **The workbook is unlocked to provide maximum functionality; therefore, users should exercise caution to avoid deleting these formulas.**

OCA provides the MSJ Report Workbook *as is* and makes no guarantee regarding the accuracy or correctness of the due dates and compliance assessments generated from user-entered data. ***Users are strongly encouraged to verify the calculated totals on the MSJ Report Totals worksheet before reporting them to OCA.***

For ease of use, it is recommended that a master MSJ Report Workbook copy be saved, and a separate MSJ Report Workbook be used for each reporting quarter or fiscal year.

There are six (6) tabs on the MSJ Report Workbook:

- **Courts Index:** Used to create a complete list of all reported courts.
- **MSJ Report Worksheet:** This is the primary worksheet, used to enter and track each motion for summary judgment filed in each court.
- **MSJ Report Totals:** Summarizes the total number of MSJs in each court that are compliant and non-compliant.
- **ZERO Reports:** Used to create a list of courts in which no MSJs were filed or reportable in the current quarterly report.
- **Legal Holidays:** Used to list the legal holidays to ensure that a due date falling on a holiday is changed to the next business day.
- **Quarter Dates:** A list of the date ranges for each quarter of the State Fiscal Year and the corresponding report due dates to OCA.

## INSTRUCTIONS

- **COURTS INDEX TAB**

- List all courts for which you will submit reports, including courts that do not hear motions for summary judgment.
- Include the Court Type, Court ID, and Court Name for each court – see the **Court Identifiers List** at <https://www.txcourts.gov/reporting-to-oca/district-county-court-level-reporting/motion-for-summary-judgment/>. NOTE: These are the same Court IDs required for the Annual Performance Measures Reports.
- Use these entries to copy and paste each court in the MSJ Report Worksheet and Zero Reports worksheet as needed.
  - On the Courts Index tab, highlight the cells containing the Court Type, Court ID, and Court Name, right-click, and “Copy.”
  - On the MSJ Report Worksheet or Zero Reports tab, highlight the corresponding cells, right-click, and “Paste.”

- **MSJ REPORT WORKSHEET TAB**

- At the user’s discretion, online resources may be used to verify the due dates generated by the worksheet.
- **Calculating Due Dates**
  - Timeframes calculated on the MSJ Report Worksheet include weekends and holidays, except that if the requirement due date falls on a Saturday, Sunday, or legal holiday, the result will be the date of the next business day. See **LEGAL HOLIDAYS** for detailed information. The date of the event that starts a due date calculation is not included in the timeframe, i.e., MSJ file date and MSJ hearing/submission date, that is entered by the user.
  - Setting Due Date (column H): 60 days vs. 90 days
    - Use column G to indicate whether the court notified the clerk that the hearing/submission date needs to be later than 60 days after the MSJ file date. This may be communicated in a notice of setting or other method.
    - If column G is “Y” the Setting Due Date in column H will be calculated as 90 days after the MSJ file date; if “N”, the Setting Due Date will be calculated as 60 days after the MSJ file date.

- NOTE: If courts need to set a date that is 61-90 days after the MSJ file date, a notice of setting may include this information and may indicate one of the reasons listed in Government Code, [Sec. 23.303\(a\)\(1\)\(B\)](#):
  - The Court’s docket requires it;
  - Good cause has been shown; or
  - The movant agrees.

- **Data Entry:** Enter the required information in the columns with **green** headings. Columns with **grey** headings are auto-populated using Excel formulas. The workbook is unlocked to provide maximum functionality; therefore, users should exercise caution to avoid deleting these formulas.

NOTE: SEE  
“MSJ  
WORKBOOK  
EXAMPLES”  
FOR SAMPLE  
ENTRIES AND  
DETAILS

- Columns A through C: Enter the Court Type, Court ID, and Court Name for each MSJ entered. This information may be copied from the Courts Index tab and pasted here.
- Column D: Enter Cause No. for each MSJ entered. If multiple MSJs are filed in the same case, use a separate row for each MSJ.
- Column E: Enter the MSJ File Date. An amended MSJ does not change the file date.
- Column F, Withdrawn/Dismissed/Deactivated: Enter “Y” or “N” to ensure accurate totals on the MSJ Report Totals tab; do not leave blank. **MSJs that are withdrawn and MSJs that are dismissed or deactivated prior to the setting date will not be reported.** If “Y” is entered, column J, Setting Requirement Met, and column M, Ruling Requirement Met, will be auto-populated as “N/A”.
  - If the MSJ is withdrawn at any point, enter “Y”.
    - NOTE: Any withdrawal of the motion must be filed and must identify the date the motion was filed.
  - If the MSJ is dismissed prior to the MSJ Setting Date, enter “Y”. Also see [MSJ Dismissed on or after MSJ Setting Date](#).
  - If a deactivating event is filed on or before the MSJ Setting Date, enter “Y”. Examples include but are not limited to:
    - Notice of Bankruptcy
    - Soldiers & Sailors Relief Act
    - Order of Abatement

See the “OCA Monthly Court Activity Report Instructions” for additional examples.

- If the MSJ is not withdrawn, dismissed or deactivated, enter “N”.
- Column G, Notice Provided for Setting Date 61-90 Days: Enter “Y” or “N” to ensure accurate calculations in Column H, Setting Due Date, do not leave blank.
  - **COURT SETTING TIP:** Court setting notices may include this information if a setting later than 60 days from file date is necessary.
- Column H, Setting Due Date: This column is auto-populated based on the entries in columns E and G. This is the calculated due date based on the user’s entries.
- Column I, Hearing/Submission Setting Date: Enter the setting date provided by the court. If the court resets the hearing/submission date, enter the new date in this column.
- Column J, Setting Requirement Met: This column is auto-populated based on the entries in columns E, G, H, and I. It measures whether the court set the hearing/submission date within the times prescribed.
  - NOTE: If the Setting Date is not in compliance with the requirements, column J and column N will auto-populate “N” indicating overall noncompliance.
    - If the court does not change the setting by the Setting Due Date (column H) to a date that is in compliance, the MSJ will be counted as noncompliant in column E of the MSJ Report Totals tab. No further compliance tracking is required. Since the court has up to 90 days after the MSJ file date to change the setting date for compliance, report the MSJ as noncompliant in the quarter in which the latest possible setting date falls (MSJ file date + 90 days) unless the court resets to a date that is within compliance.
- If the court changes or resets the MSJ Setting Date, enter the new date in column I. If the new date is in compliance, this will result in “Y” for Setting Requirement Met (column J) and report tracking will continue for Ruling File Date compliance. Also see [Reset of Hearing/Submission Date](#).
- If no setting date is entered in column I, Hearing/Submission Setting Date, this will result in “Pending” if the calculated Setting Due Date in column H is later than the current date.

**COMPLIANCE  
ELEMENT #1**

**COMPLIANCE  
ELEMENT #2**

- If the result is “Pending,” this MSJ will not be counted on the MSJ Report Totals tab for the current reporting quarter and report tracking will continue for MSJ Setting Date compliance. Also see [“Pending” Status on the MSJ Report Worksheet](#).
- If no setting date is entered in column I by the Setting Due Date, column J and column N will result in “N” for overall noncompliance. Since the court has up to 90 days after the MSJ file date to set the date for hearing or submission, report the MSJ as noncompliant in the quarter in which the latest possible setting date falls (MSJ file date + 90 days).
- Column K, Judgment/Ruling Due Date: This column is auto-populated based on 90 days from the Setting Date entered in column I. Note: Also see [Date of Hearing/Submission Entered on Court’s Docket; Ruling Due Date](#).
- Column L: Enter the date that the court’s judgment/ruling was filed with the clerk.
- Column M, Ruling Requirement Met: This column is auto-populated based on the entries in columns I, K, and L. It measures whether the court’s ruling was filed within the time prescribed.
  - If the date entered in column L, Judgment/Ruling File Date, is on or before the due date in column K, column M will result in “Y” for Ruling Requirement Met.
    - If column J, Setting Requirement Met, is also “Y”, this will result in “Y” for overall compliance in column N, All Requirements Met. Report the MSJ as compliant in the quarter in which the Judgment/Ruling File Date (column L) falls.
  - If the date entered in column L, Judgment/Ruling File Date, is later than the due date in column K, column M and column N will result in “N” indicating overall noncompliance. Report the MSJ as noncompliant in the quarter in which the Ruling Due Date (column K) falls, which is the date of noncompliance.
  - If no date is entered in column L, Judgment/Ruling File Date, this will result in “Pending” if the calculated due date in column K is later than the current date.
    - If the result is “Pending,” this MSJ will not be counted on the MSJ Report Totals tab for the current reporting quarter and report tracking will

continue for MSJ Ruling compliance. Also see [“Pending” Status on the MSJ Report Worksheet](#).

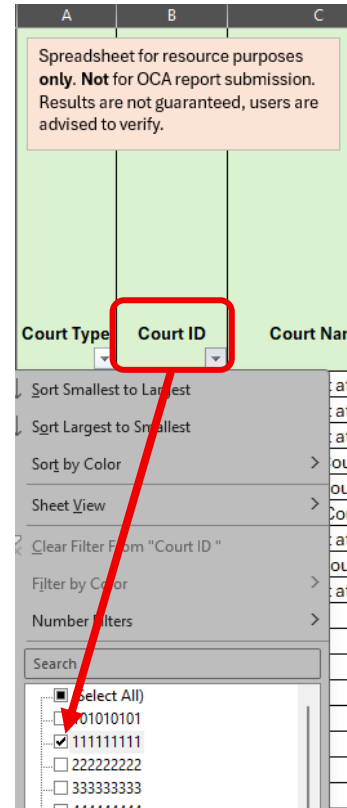
- If no ruling file date is entered in column L by the Judgment/Ruling Due Date, column M and column N will result in “N” indicating overall noncompliance. Report the MSJ as noncompliant in the quarter in which the Judgment/Ruling Due Date (column K) falls.
  - Column N, All Requirements Met: This column is auto-populated based on the results in column J, Setting Requirement Met, and column M, Ruling Requirement Met.
    - This column measures the court’s overall compliance with the statutory requirements for reporting purposes. The results in this column will auto-populate the MSJ Report Totals tab, either in column E, # MSJs Compliant (“Y”), or column F, # MSJs Noncompliant (“N”).
  - Column O, MSJ Tracking Notes: This column may be used to track helpful information that is specific to the MSJ entered, such as movant name when multiple MSJs are filed by different parties in the same case, etc. This column does not affect worksheet calculations.
- **MSJ REPORT TOTALS TAB**
    - Counts of the compliant and noncompliant MSJs on the MSJ Report Worksheet will be totaled for each court on this worksheet.
    - NOTE: This is **not** the MSJ Report Template and should **not** be submitted to OCA unless otherwise instructed.
    - OCA recommends that the user verify the results on the MSJ Report Totals tab before submitting compliance totals in a report to OCA.
  - **ZERO REPORTS TAB**
    - This worksheet may be used to group the courts that did not have any reportable MSJs in the reporting quarter. Because those courts will not appear on the MSJ Report Totals tabs, this tab serves as the place where the user can compile a list of Zero Reports.
    - NOTE: This is **not** the MSJ Zero Report Template and should **not** be submitted to OCA unless otherwise instructed.

○ Data Entry:

- Enter the Court Type, Court ID, and Court Name of each court having no reportable MSJs in the reporting quarter. Include courts that have only pending MSJs that are not yet subject to compliance reporting and courts that do not hear motions for summary judgment, i.e., criminal courts.

- Courts with Pending MSJs:

- Use the Court ID column filter on the MSJ Report Worksheet to find each court having pending MSJs that are not yet subject to compliance reporting. Uncheck “(Select All)” and check box for specific court, then click “OK”.
- If all MSJs listed for a court show “Pending” in column N, All Requirements Met, include this court on the Zero Reports worksheet.



	A	B	C	D	E	F	G	H	I	J	K	L	M	N
	Court Type	Court ID	Court Name	Cause No.	MSJ File Date <i>NOTE: Enter file date of each MSJ, even if multiple filed in same case.</i>	Dismissed Prior to Hearing/ Consideration, Deactivating Event Filed*, or Motion to Withdraw Filed (Enter Y or N) <i>NOTE: Do not report.</i>	Reason Provided for Setting Date 61-90 Days? (Enter Y or N)	MSJ Setting Due Date	Hearing/ Submission Setting Date (36 - 90 days from file date) <i>NOTE: Enter date provided by Court; if none, leave blank. If reset, enter reset date.</i>	Setting Requirement met? (Y/N)	Judgment/ Ruling Due Date	Judgment/ Ruling File Date	Ruling Requirement met? (Y/N)	ALL REQUIREMENTS MET
1														
2	County	77777777	County Court at Law	12222	3/1/2026	N	Y	6/1/2026	4/24/2026	Y	7/23/2026		Pending	Pending
10	County	77777777	County Court at Law	12223	3/1/2026	N	N	4/30/2026	4/20/2026	Y	7/20/2026		Pending	Pending

- Columns D and E on the Zero Reports worksheet are entered as “0.” No data entry is required.

- **LEGAL HOLIDAYS TAB**

- If you are not sure what qualifies as a “legal holiday,” please consult your legal counsel or other available resources.
- Enter the date of each day that is a holiday, through Row 50 of the worksheet (intended to cover a 2-year period). Clerks will need to update the dates as needed each year or each fiscal year to ensure that a due date calculated on the MSJ Report Worksheet that falls on a holiday is adjusted to the next business day.
- Enter each date of a multi-day holiday when applicable, e.g., Thanksgiving and Christmas, etc.
- SATURDAYS & SUNDAYS:
  - Note that the Setting and Ruling Due Date formulas on the MSJ Report Worksheet take weekends into consideration. Saturdays and Sundays are included in the calculated time periods; however, a due date that falls on a Saturday or Sunday will automatically advance to the next business day.

- **QUARTER DATES TAB**

- Date ranges for each quarter of the State Fiscal Year are listed on this tab for reference, along with the corresponding OCA report due dates.

## **ADDITIONAL INFORMATION**

- **“Pending” Status on the MSJ Report Worksheet**

- MSJs with a “Pending” status should continue to be tracked for compliance reporting.
- If no date is entered in column I, Hearing/Submission Setting Date, this will result in “Pending” if the calculated Setting Due Date in column H is later than the current date.
  - If the result is “Pending,” this MSJ will not be counted on the MSJ Report Totals tab for the current quarter.
- If no date is entered in column L, Judgment/Ruling File Date, this will result in “Pending” if the projected Ruling Due Date in column K is later than the current date.
  - If the result is “Pending,” this MSJ will not be counted on the MSJ Report Totals tab for the current quarter.

- **Reset of Hearing/Submission Date**
  - If the court resets the MSJ Setting Date, the user should change the date entered in column I, Hearing/Submission Setting Date, of the MSJ Report Worksheet. Please note that the timeframes for the initial setting date also apply to a reset date; therefore, the due date calculation will remain the same.
    - **COURT SETTING TIP:** Court setting notices may include notice that a setting a date that is later than 60 days from file date is necessary.
- **MSJ Dismissed on or after MSJ Setting Date**
  - If an order of dismissal is filed on or after the MSJ Setting Date entered in column I of the MSJ Report Worksheet, treat the order of dismissal as the court’s ruling. Do not enter “Y” in column F, as column F should be used only for dismissals prior to the setting date.
- **Date of Hearing/Submission Entered on Court’s Docket; Ruling Due Date**
  - The date of hearing/submission entered in the docket by the court is not a reportable element, so it is not included on the MSJ Report Worksheet; however, the court’s ruling due date is measured from this date, per Government Code, [Section 23.303](#).
  - The worksheet calculates the Judgment/Ruling Due Date in column K by adding 90 days to the setting date entered in column I.
  - **IMPORTANT TIP:** If the actual hearing/consideration date entered on the court’s docket is different from the MSJ Setting Date entered in column I, a reset notice should be provided to the clerk. This will enable the clerk to change the MSJ Setting Date on the MSJ Report Worksheet and ensure that the Ruling Due Date will be calculated correctly.

Please direct questions about the MSJ Compliance & Reporting Requirements to: [judinfo@txcourts.gov](mailto:judinfo@txcourts.gov).