

INTRODUCTION

The **Florida State Courts Summary Reporting System Manual** has been updated and enhanced to incorporate the changes that have taken place since the original manual was released. This manual includes more examples and definitions to assist you in the completion of the monthly caseload report for the Office of the State Courts Administrator (OSCA). We designed the manual to be placed into a three-ring binder so that future changes or enhancements to the reporting requirements can be made without revising the entire manual.

Pursuant to Section 25.075, Florida Statutes, the Supreme Court developed an uniform case reporting system. The Summary Reporting System (SRS), as it is commonly known, provides the OSCA with data which assists the Supreme Court in its management and oversight role. While the SRS is used as a workload measure for judges, it is not intended to measure the efficiency of the judiciary, state attorneys or public defenders. The primary purpose of the SRS is the certification of the need for additional judgeships. Under the provisions of Article V, Section 9 of the Florida Constitution, the Florida Supreme Court is responsible for determining the need for additional judges in the District Courts of Appeal and circuit trial courts. The SRS provides the primary data to project the need for additional judgeships.

In addition to certification, SRS data is used for the formulation of budgets, the preparation of legislative fiscal notes, the assessment of the impact of proposed legislation or court rules, and as an information resource for all courts, criminal justice agencies, news media and the general public.

Because of the critical and varied uses of SRS data, it is imperative that each county report the SRS data in a consistent, uniform manner. Such reporting will help ensure that the SRS is accurate and reliable. This manual was designed to assist you in this endeavor.

The following highlights design strategies incorporated in this manual:

- U Each tab designates a specific section related to SRS reporting or provides detailed information and guidelines to assist you in completing the monthly reporting forms.
- U The guidelines follow the format of the SRS reporting form and are preceded by an "U." Common reporting errors are preceded by an "Y."
- U Offender Based Transaction System (OBTS) instructions and required data elements have been incorporated in the circuit and county criminal portions of the manual. All OBTS guidelines are formatted in shaded boxes. A detailed explanation of OBTS/SRS data compilations can be found under the section entitled, OBTS.

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- U Pending Caseload instructions and requirements are included in the section entitled, Pending Report.
- U Casetype category definitions and examples are located in the section entitled, Category Definitions.
- U SRS audit requirements and audit trail specifications are presented in the section entitled, Audit Trails.
- U A glossary of data definitions and terms are provided in the section entitled, Glossary.
- U Behind the last tab is a comprehensive index.

Preparation of SRS and Pending Caseload Reports

The following procedures will help ensure consistent reporting from all counties. These procedures are as follows:

- U The Summary Reporting System (SRS) and Pending Caseload reports should be easy to read to aid accurate data entry.
- U Each reporting category should be completed. If no reporting activity occurred during the month, then insert a zero in the category in question.
- U Computer generated reports are acceptable **if** they are in the same format and design as the SRS form and Pending Caseload report.
- U The SRS and Pending Caseload reports should be submitted on 8½ × 11 inch paper with a portrait orientation, **in page number order**, and with a staple in the top left hand corner.

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Verification of SRS and Pending Caseload Reports

- U Review the SRS and Pending Caseload reports for accuracy before submitting to the OSCA. Check for data entry errors or omissions to the report.
- U If a reporting category experiences an unusually high or low number of occurrences, attach a note to that portion of the report explaining the fluctuation. This will assist the analyst responsible for monitoring the data.
- U Upon receipt of the SRS and Pending Caseload reports, OSCA staff will review the data for accuracy. If errors are detected on the SRS report, then the county will be contacted to assist in their correction.

Submission of SRS and Pending Caseload Reports

- U Submit your complete SRS report for all court divisions so that the OSCA receives your report by the 15th day of the succeeding month. The SRS report should be sent to:

Office of the State Courts Administrator
Research, Planning and Court Services
Supreme Court Building
500 South Duval Street
Tallahassee, Florida 32399-1900
Attention: SRS Circuit (place your county's circuit number)

- U Submit your SRS criminal data submitted through the Offender Based Transaction System (OBTS) so that the OSCA receives your tapes and diskettes by the 15th day of the succeeding month. The OBTS tapes and diskettes should be sent to:

Information Systems Services
OBTS Unit
Supreme Court Building
500 South Duval Street
Tallahassee, Florida 32399-1900

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Note: Monthly copies of the circuit and county criminal OBTS data will be provided to the county by the Research, Planning and Court Services Section.

- U Submit your complete Pending Caseload report for all court divisions so that the OSCA receives your report by 15th day of the succeeding quarter (i.e., April 15, July 15, October 15, January 15). The Pending Caseload report should be sent to:

Office of the State Courts Administrator
Research, Planning and Court Services
Supreme Court Building
500 South Duval Street
Tallahassee, Florida 32399-1900
Attention: PCR Circuit (place your county's circuit number)

Amending SRS and Pending Caseload Reports

- U If a county discovers a discrepancy on an SRS or Pending Caseload report already submitted to the OSCA, the county should prepare an amended SRS or Pending Caseload report and submit it to the OSCA immediately.
- U Submit only the reporting category being modified on the amended SRS or Pending Caseload form.
- U Highlight the change and type **Amended Report** at the top of the form.
- U If a computer-generated report is modified with all reporting categories listed, then all amended figures must be highlighted to facilitate accurate data entry.
- U Amended SRS and Pending Caseload reports can be submitted at any time.

Questions Concerning SRS/OBTS Reporting Requirements

- U Questions regarding the preparation of the **SRS** report or reporting requirements can be directed to Research, Planning and Court Services staff (904) 922-5094 or Suncom 292-5094.
- U Questions regarding the submission of **OBTS** tapes and diskettes or OBTS technical questions can be directed to Information Systems Section staff at (904) 488-6568 or Suncom 278-6568.

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- U** Questions regarding the preparation of the **Pending Caseload** report or reporting requirements can be directed to Research, Planning and Court Services staff (904) 922-5094 or Suncom 292-5094.