

Probate Template- Defined – 2024

***Note-** The example template heading below includes numbered columns for the purpose of providing general instruction. The various versions of Probate templates include a sequence of letters that identify the columns- Statutory County columns - CT – DM; Statutory Probate columns- D – W; Constitutional columns- BB -BS.

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
Probate Active Pending Beginning of Period	Probate Cases Filed (Line 1 Partial)	Internal Transfers In (NEW)	Probate Cases Reactivated (Line 2 a & b Partial)	Probate Cases Disposed	Internal Transfers Out (NEW)	Probate Cases Placed on Inactive Status	Probate Active Pending End of Period	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 End of Period - 3 Months or Less	Probate Active Pending End of Period - Over 3 to 6 Months	Probate Active Pending End of Period - Over 6 to 12 Months	Probate Active Pending End of Period - Over 12 to 18 Months	Probate Active Pending End of Period - Over 18 Months	Probate Active Pending End of Period - Total

- Column 1- Probate Active Pending Beginning of Period:** ALL probate and guardianship ORIGINAL or SUBSEQUENT ACTIONS filed on or after March 1, 2020*, that were pending on March 1, 2024; may be more than 1 pending action in a single case (particularly if contested). Should NOT include active cases in which there was no “pending” application or motion on March 1, 2024.
- Column 2- Probate Cases Filed (Line 1 Partial):** ALL ORIGINAL and SUBSEQUENT ACTIONS filed during the reporting period; in this column, clerks should report NEW CASES filed, including ANCILLARY CASES, which, in the probate court, are NEW CASES related to existing cases; CONTESTS/ADVERSE ACTIONS; ALL OTHER MATTERS (subsequent actions as defined on Judicial Council Monthly Court Activity Report instructions for Line 2.b.); and TRANSFERS IN from a court of a different type (i.e., report a transfer from County Court to County Court at Law as CASE FILED for County Court at Law) or from a court in another county.
- Column 3- Internal Transfers In:** Report Cases that have been transferred to another court of the same level in the county. (Example: A judge recused, transfer from County Court at Law #1 to County Court at Law #2 will be reported in “Internal Transfers In” for County Court at Law #2.)
- Column 4- Probate Cases Reactivated (Line 2 a & b Partial):** Only guardianship cases that are ordered restored to the court’s active docket following order removing from active docket per Estates Code, Sec. 1204.201(b) or (c).
- Column 5- Probate Cases Disposed:** ALL ORIGINAL and SUBSEQUENT ACTION Dispositions occurring during the reporting period, and all TRANSFERS OUT to a court of a different level in the county (i.e., report a transfer from County Court to County Court at Law as CASE DISPOSED for the County Court) or to any court in another county.
- Column 6- Internal Transfers Out:** Report the number of cases transferred to another court of the same level within the county, where it is being removed from one court’s docket and added to another court (Example: County Court at Law #1 transfers to County Court at Law #2 reported as “Internal Transfer Out” for County Court at Law #1.)
- Column 7- Probate Cases Placed on Inactive Status:** Only guardianship cases ordered removed from the court’s active docket per Estates Code, Sec. 1204.201(b) or (c).
- Column 8- Probate Active Pending End of Period:** ALL ORIGINAL and SUBSEQUENT ACTIONS filed on or after March 1, 2020* that are pending on August 31.
- Columns 9 – 14- Probate AoC (Age of Case) Disposed:** Report dispositions of original and subsequent actions that occurred within the time span specified in the column headers, from the date of filing to the date of disposition. (Example: Application filed 4/1/2024, disposed 7/1/2024, span of time elapsed from filing to disposition = 92 days, or 3 months 1 day, report in column 10 above).
- Columns 15 – 20- Probate Active Pending End of Period:** Report pending original and subsequent actions with aging periods that fall within the time span specified in the column headers, from the date of filing to the reporting period end date August 31. (Example: Application filed 4/1/2024, still pending on 8/31/2024, span of time elapsed from filing to end of reporting period = 153 days, or 5 months, report in column 16 above).

* OCA has determined that it is necessary to set a 4-year “look back” date for actions to be considered for inclusion in the Active Pending columns at the beginning and end of the reporting period due to the enormity of the current task of sorting and reviewing all the open probate and guardianship cases in courts across the state. This 4-year “look back” period is granted only on the initial Performance Measures Report that is due by November 1, 2024, and is not in any way related to the 4-year period from the date of death in which an application for administration of a decedent’s estate must be filed in the probate court. Clerks must make every effort to update their case data going forward to ensure that complete, accurate data will be submitted in the Performance Measures Report that will be due by November 1, 2025. Please email judinfo@txcourts.gov with questions.