



## MIDC Caseload Tracker Explanation

### Basic Version

#### Purpose

MIDC Caseload Tracker spreadsheets provide local indigent defense systems with tools to track attorney workloads and calculate attorneys' proximity to Standard 6 workload maximums.

The *Basic Version* is designed to function as a pre-built calculator for systems looking to analyze attorneys who carry mixed caseloads (i.e., a mix of felonies, misdemeanors, arraignment shifts, etc.). Systems can enter an attorney's assignments and docket hours into the spreadsheet, and the spreadsheet will calculate how close the attorney is to their workload maximum and how many assignments and hours remain available.

#### Format

The sheet has three tabs: *Annual*, *Quarterly*, and *Monthly*. These tabs all operate the same way, but they are based on different workload maximums. The *Annual* tab is based on the full-year workload maximums outlined in Standard 6 and Page 29 of the MIDC Grant Manual.

The *Quarterly* tab uses 1/4<sup>th</sup> of the annual workload maximum and the *Monthly* tab uses 1/12<sup>th</sup> of the workload maximum to aid systems that want to monitor smaller time increments.

Please note that this spreadsheet is not set up to track a rolling year. Rather, this spreadsheet only allows you to track a month/quarter/year with a fixed start date. To track on a rolling year, please refer to the other spreadsheets posted on the MIDC website.

	Workload To Date				PV	Docket Hours	% of Cap	Maximums Left		
Attorney Name	Felony Assignments	Non-Traffic Misdemeanor Assignments	Traffic Misdemeanor Assignments	Felony Assignments				Non-Traffic Misdemeanor Assignments	Traffic Misdemeanor Assignments	
Test Attorney 1	0	150	400	800						
Test Attorney 2	0	150	400	800						
Test Attorney 3	0	150	400	800						
Test Attorney 4	0	150	400	800						
Test Attorney 5	0	150	400	800						
Test Attorney 6	0	150	400	800						
Test Attorney 7	0	150	400	800						
Test Attorney 8	0	150	400	800						
Test Attorney 9	0	150	400	800						
Test Attorney 10	0	150	400	800						
Test Attorney 11	0	150	400	800						
Test Attorney 12	0	150	400	800						
Test Attorney 13	0	150	400	800						
Test Attorney 14	0	150	400	800						
Test Attorney 15	0	150	400	800						
Test Attorney 16	0	150	400	800						
Test Attorney 17	0	150	400	800						
Test Attorney 18	0	150	400	800						

Callout 1: This section is for entering data about assignments for attorneys. It is designed for total assignments made during an annual period.

Callout 2: This section uses the data entered in the Workload section to the left to calculate what percentage of the attorney's annual cap has been reached.

Callout 3: This section uses the data entered in the Workload section to the left to calculate the number of assignments an attorney has left for the year based on a maximum for that category of assignment going forward.

## Using the Spreadsheet

Each tab has three sections: *Workload to Date*, *% of Cap*, and *Maximums Left*. Users enter data in the *Workload to Date* section and the other two sections calculate outputs automatically to inform systems how close the attorney is to their workload maximum and how many assignments and hours remain available. Users can update the *Workload to Date* section throughout the year to determine how many assignments and hours are left to assign to their attorneys.

Attorney Name	Workload To Date					% of Cap	Maximums Left				
	Felony Assignments	Non-Traffic Misdemeanor Assignments	Traffic Misdemeanor Assignments	PV	Docket Hours		Felony Assignments	Non-Traffic Misdemeanor Assignments	Traffic Misdemeanor Assignments	PV	Docket Hours
Test Attorney 1						0	150	400	800	800	1856
Test Attorney 2						0	150	400	800	800	1856
Test Attorney 3						0	150	400	800	800	1856
Test Attorney 4						0	150	400	800	800	1856
Test Attorney 5						0	150	400	800	800	1856
Test Attorney 6						0	150	400	800	800	1856
Test Attorney 7						0	150	400	800	800	1856
Test Attorney 8						0	150	400	800	800	1856
Test Attorney 9						0	150	400	800	800	1856
Test Attorney 10						0	150	400	800	800	1856
Test Attorney 11						0	150	400	800	800	1856
Test Attorney 12						0	150	400	800	800	1856
Test Attorney 13						0	150	400	800	800	1856
Test Attorney 14						0	150	400	800	800	1856
Test Attorney 15						0	150	400	800	800	1856
Test Attorney 16						0	150	400	800	800	1856
Test Attorney 17						0	150	400	800	800	1856
Test Attorney 18						0	150	400	800	800	1856

### *Workload to Date*

There are five columns for users to enter data for each attorney: felony assignments, non-traffic misdemeanors assignments, traffic misdemeanors assignments, probation violations assignments, and docket hours (e.g., hours covering an arraignment shift or a house counsel shift).

Attorney Name	Workload To Date				
	Felony Assignments	Non-Traffic Misdemeanor Assignments	Traffic Misdemeanor Assignments	PV	Docket Hours
Test Attorney 1					
Test Attorney 2					
Test Attorney 3					
Test Attorney 4					
Test Attorney 5					
Test Attorney 6					

### *% of Cap*

When a user enters data in the *Workload to Date* section, the spreadsheet automatically calculates the *% of Cap* column. This percentage tells the user what percentage of the attorney's annual workload maximum has been reached based on the workload that has been entered (or quarterly/monthly if using one of the other tabs).

For example, the image below shows an attorney who has been assigned 40 felonies, 70 non-traffic misdemeanors, 20 traffic misdemeanors, 5 probation violations, and 40 hours of docket coverage.

Attorney Name	Workload To Date				Docket Hours	% of Cap
	Felony Assignments	Non-Traffic Misdemeanor Assignments	Traffic Misdemeanor Assignments	PV		
Test Attorney 1	40	70	20	5	40	49
Test Attorney 2						
Test Attorney 3						
Test Attorney 4						

The spreadsheet reports that this attorney has reach 49% of their annual workload maximum based on those assignments and hours.

*Maximums Left*

When a user enters data in the *Workload to Date* section and the spreadsheet automatically calculates the *% of Cap* column, it also calculates *Maximums Left* for that attorney. The *Maximums Left* section provides maximums for each type of assignment or docket hours an attorney could work.

Using the same example of the attorney who has worked 49% of their annual workload maximum, the spreadsheet shows the number of assignments or docket hours that this attorney could be assigned before their workload maximum is reached. The numbers are maximums for each category *if the attorney was only assigned work in that category*. In this example, this attorney could take 76 additional felony assignments for the year if they received no other new work, **or** they could take 202 new non-traffic misdemeanor assignments for the year if they received no other new work, **but not both**.

% of Cap	Maximums Left				Docket Hours
	Felony Assignments	Non-Traffic Misdemeanor Assignments	Traffic Misdemeanor Assignments	PV	
49	76	202	404	404	938

## Adding Rows for More Attorneys

The default template has room for 18 attorneys. Users can increase the number of attorneys on the sheet by highlighting any of the attorney rows, right clicking, and selecting “Insert.”

Load To Date	Felony Assignments	Non-Traffic Misdemeanor Assignments	Traffic Misdemeanor Assignments	PV	Docket Hours	% of Cap	Maximums Left	Felony Assignments	Non-Traffic Misdemeanor Assignments	Traffic Misdemeanor Assignments	PV	Docket Hours
	40	70	20	5	40	49	76	202	404	404	404	938
						0	150	400	800	800	800	1856
						0	150	400	800	800	800	1856
						0	150	400	800	800	800	1856
						0	150	400	800	800	800	1856
						0	150	400	800	800	800	1856
						0	150	400	800	800	800	1856
						0	150	400	800	800	800	1856
						0	150	400	800	800	800	1856
						0	150	400	800	800	800	1856
						0	150	400	800	800	800	1856
						0	150	400	800	800	800	1856
						0	150	400	800	800	800	1856
						0	150	400	800	800	800	1856

After inserting a new row, users should highlight the row of data above the new blank row, hover over the bottom right corner of the last column’s cell and then drag the formulas down to the new blank row.

	0		150	400	800	800	1856
	0		150	400	800	800	1856
	0		150	400	800	800	1856
	0		150	400	800	800	1856
	0		150	400	800	800	1856
	0		150	400	800	800	1856

If you are not comfortable adding rows to the spreadsheet, contact MIDC and staff will provide a spreadsheet designed for whatever number of attorneys you need.