

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 separate MSJ Report Workbook be used for each reporting quarter, e.g., “MSJ workbook FY2026 Q3”. Using a separate workbook for each reporting quarter will also help you to identify the MSJs that are ready to report for each quarter. After completing a quarter, you may save a copy of the previous workbook for the next quarter, taking care to save it under a new name, e.g., “MSJ workbook FY2026 Q4”. Delete all rows showing MSJs that do not show a “Pending” status in column N, All Requirements Met, then continue logging new MSJs filed in the new quarter on subsequent rows.

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 in the current quarterly report.
- **ZERO Reports**: Used to manually 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 cases in which motions for summary judgment may be filed.
- 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 of the applicable court, right-click, and select “Copy.”
 - On the MSJ Report Worksheet or Zero Reports tab, highlight the corresponding cells, right-click, and select “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 TAB** 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 (column E) and Date of Oral Hearing or Consideration on Submission (column J), that are entered by the user.
 - Court Setting Due Date (column G): The Court Setting Due Date in column G will be calculated as 90 days after the MSJ File Date entered in column E. This is the date by which the court must make a setting of the date for hearing on oral arguments or consideration on submission.
 - Judgment/Ruling Due Date (column K): The Judgment/Ruling Due Date in column K will be calculated as 90 days after the Date of Oral Hearing or Consideration on Submission entered in column J. This is the date by which the court must file its ruling with the clerk.

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

- **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.

- Columns A through C: Enter the Court Type, Court ID, and Court Name for each MSJ. This information may be copied from the Courts Index tab and pasted here.
- Column D: Enter Cause No. for each MSJ filed. If multiple MSJs are filed in the same case, use a separate row for each MSJ.
- Column E: Enter the MSJ File Date.
- Column F, Withdrawn, Dismissed, Denied or Otherwise Disposed Prior to Date of Hearing/Consideration or Deactivating Event Filed: 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, denied or otherwise disposed at any time prior to the Date of Oral Hearing or Consideration on Submission (column J) will not be reported.**

If “Y” is entered, column G, Court Setting Due Date, column I, Court Setting Requirement Met, and column N, All Requirements Met, will be auto-populated as “N/A” and the MSJ will not be reported.

- If the MSJ is withdrawn at any point, enter “Y”.
- If the MSJ is dismissed, denied or otherwise disposed prior to the Court Setting Due Date (column G), Court Setting Date (column H), or the Date of Oral Hearing or Consideration on Submission (column J), enter “Y”.

“Otherwise disposed” may include:

- Case disposed at final trial
- Settlement agreement disposing of case
- Nonsuit by party who filed the MSJ or disposing of case
- If a deactivating event is filed on or before the Court Setting Due Date (column G) the Date of Oral Hearing or Consideration on Submission (column J), or the Judgment/Ruling Due Date (column K), enter “Y”. “Deactivating event” may include:
 - Notice of Bankruptcy filed
 - Service Members Civil Relief Act affidavit filed
 - Order of Abatement issued by the court
 - Motion to Recuse filed

- Order to transfer to another court issued

NOTE: If the case is later returned to the court's active docket, another judge is assigned on recusal, or the case was transferred to another court, enter a new MSJ record on another row and enter the date the case was returned to the active docket, the date a judge was assigned, or the date of the transfer in the court receiving the transfer as the MSJ file date.

- If the MSJ is not withdrawn, dismissed, denied, otherwise disposed or deactivated, enter "N" in column F or leave blank.
- Column G, Court Setting Due Date: This is the date by which the court must set a date for the hearing on oral arguments or consideration on submission. This column is auto-populated based on the entries in columns E and F. This is the calculated 90-day due date based on the user's entries.

**COMPLIANCE
ELEMENT #1**

- Column H, Court Setting Date: Enter the date on which the court set the date for the oral hearing or consideration on submission.

NOTE: If the court resets the date for the hearing or consideration on submission, do not change the date previously entered in column H. This is not necessary because the initial setting completes this compliance element.

- Column I, Court Setting Requirement Met: This column is auto-populated based on the entries in columns E, F, and H. It measures whether the court set a date for oral hearing or consideration on submission within the time prescribed.
- NO COURT SETTING DATE BY DUE DATE: If the court does not set a date for oral hearing or consideration by the Court Setting Due Date (column G), column I and column N will auto-populate "N" indicating overall noncompliance and the MSJ will be counted as noncompliant in column E of the MSJ Report Totals tab. No further compliance tracking is required. Report the MSJ as noncompliant in the quarter in which the Court Setting Due Date falls.
- COURT SETTING DATE IS PAST DUE DATE: If the date entered in column H, Court Setting Date, is later than the Court Setting Due Date in column G, column I and column N will auto-populate "N" for overall noncompliance and the MSJ will be counted as noncompliant on the MSJ Report Totals tab (column E). No further compliance tracking is required. Report the MSJ as noncompliant in the quarter in which the Court Setting Due Date falls.

**COMPLIANCE
ELEMENT #2**

- **SETTING DUE DATE STILL PENDING:** If no date is entered in column H, Court Setting Date, this will result in “Pending” if the calculated Court Setting Due Date in column G is later than the current date.
 - If the result is “Pending” after the end of the quarter, this MSJ will not be counted on the MSJ Report Totals tab for the current reporting quarter and report tracking will continue for Court Setting Date compliance. Also see [“Pending” Status on the MSJ Report Worksheet](#).
- **Column J, Date of Oral Hearing or Consideration on Submission:** Enter the date on which the hearing on oral arguments or consideration on submission occurred as entered on the court’s docket.
- **Column K, Judgment/Ruling Due Date:** This is the date by which the court must file a ruling on the MSJ. This column is auto-populated based on 90 days from the Date of Oral Hearing or Consideration on Submission entered in column J.
- **Column L, Judgment/Ruling File Date:** 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 J and L. It measures whether the court’s ruling was filed within the time prescribed.
 - **RULING TIMELY FILED:** If the date entered in column L, Judgment/Ruling File Date, is on or before the due date in column K, column M will auto-populate “Y” for Ruling Requirement Met.
 - **NO RULING FILED BY DUE DATE:** If no ruling file date is entered in column L by the Judgment/Ruling Due Date, column M and column N will auto-populate “N” indicating overall noncompliance and the MSJ will be counted on the MSJ Report Totals tab in column E, Noncompliant. Report the MSJ as noncompliant in the quarter in which the Judgment/Ruling Due Date (column K) falls.
 - **RULING FILED AFTER DUE DATE:** 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 auto-populate “N” indicating overall noncompliance and the MSJ will be counted on the MSJ Report Totals tab in column E, Noncompliant. Report the MSJ as noncompliant in the quarter in which the Judgment/Ruling Due Date (column K) falls, which is the date of noncompliance.

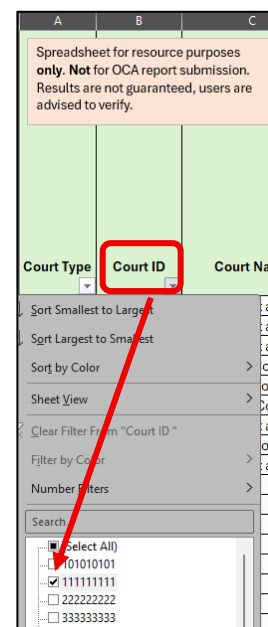
- **RULING DUE DATE STILL PENDING:** If no date is entered in column L, Judgment/Ruling File Date, this will result in “Pending” if the calculated due date in column K is later than the current date.
 - If the result is “Pending” after the end of the quarter, this MSJ will not be counted on the MSJ Report 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](#).
- **NOTE:** If the Judgment/Ruling File Date is entered in column L but no date was entered in column J, Date of Oral Hearing or Consideration on Submission; column M, Ruling Requirement Met; and column N, All Requirements Met will remain blank and the MSJ will not be counted on the MSJ Report Totals tab. Please contact the court to obtain the date that the court held the hearing on oral arguments or considered the MSJ on submission and enter this date in column J, Date of Oral Hearing or Consideration on Submission to ensure that the Judgment/Ruling File Date in column L can be correctly assessed in column M, Ruling Requirement Met.
- **Column N, All Requirements Met:** This column is auto-populated based on the results in column I, Court 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”).
 - If Column I, Court Setting Requirement Met and Column M, Ruling Requirement Met = “Y”, overall compliance in column N will be “Y” and the MSJ will be counted in Column D, Compliant, on the MSJ Report Totals tab.
 - If one or both Requirement Met columns on the worksheet (column I and column M) are “N”, overall compliance in column N will be “N” and the MSJ will be counted in Column E, Noncompliant, on the MSJ Report Totals tab.
- **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. To ensure that only MSJs reportable in the current quarter are counted, it is recommended that a separate workbook be used for each quarter of the fiscal year. Do not report the totals until the quarter has ended.
- NOTE: This is **not** the MSJ Report Template and should **not** be submitted to OCA unless otherwise instructed. Please see “**MSJ Courtal Report Submission Instructions**” at <https://www.txcourts.gov/reporting-to-oca/district-county-court-level-reporting/motion-for-summary-judgment/>.
- 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 manually compile a list of Zero Reports.
- 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
Spreadsheet for resource purposes only. Not for OCA report submission. Results are not guaranteed, users are advised to verify.					Withdrawn, Dismissed, Denied or Otherwise Disposed Prior to Date of Hearing/ Consideration or Deactivating Event Filed* (Enter Y or N) (NOTE: Do not report.)								
Court Type	Court ID	Court Name	Cause No.	MSJ File Date (NOTE: Enter file date of each MSJ, even if multiple filed in same case.)		Court Setting Due Date	Court Setting Date (NOTE: Enter date Court setting is made; if not set, leave blank.)	Court Setting Requirement met? (Y/N)	Date of Oral Hearing or Consideration on Submission	Judgment/ Ruling Due Date	Judgment/ Ruling File Date	Ruling Requirement met? (Y/N)	ALL REQUIREMENTS MET
County	11111111	County Court at Law	12222	3/9/2026	N	6/8/2026	5/29/2026	Y				Pending	Pending
County	11111111	County Court at Law	12223	8/12/2026	N	11/10/2026		Pending				Pending	Pending

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

A	B	C	D	E
Spreadsheet for resource purpose only. Not for OCA report submission.				
Court Type (Business, District, or Statutory County)	Court ID	Court Name	# Motions for Summary Judgment - Compliant (Total "Y" on worksheet)	# Motions for Summary Judgment - Noncompliant (Total "N" on worksheet)
County	11111111	County Court at Law	0	0
			0	0

• 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 in column A 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 Court Setting Due Date and Judgment/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 H, Court Setting Date, this will result in “Pending” if the calculated Court Setting Due Date in column G is later than the current date.
 - If the result is “Pending” after the end of the quarter, this MSJ will not be counted on the MSJ Report Totals tab for the current quarter and will continue to be tracked in the next quarter.
 - If no date is entered in column L, Judgment/Ruling File Date, this will result in “Pending” if the calculated Ruling Due Date in column K is later than the current date.
 - If the result is “Pending” after the end of the quarter, this MSJ will not be counted on the MSJ Report Totals tab for the current quarter and will continue to be tracked in the next quarter.
- **MSJ dismissed or denied on or after the Date of Oral Hearing or Consideration on Submission**
 - If an order of dismissing or denying the MSJ is filed on or after the Date of Oral Hearing or Consideration on Submission entered in column J of the MSJ Report Worksheet, treat the order as the court’s ruling. Do not enter “Y” in column F, as column F should be used only for MSJs that are dismissed, denied, or otherwise disposed prior to the Court Setting Due Date (column G), the Court Setting Date (column H), or the Date of The Oral Hearing or Consideration on Submission (column J).

Please direct questions about the MSJ Compliance & Reporting Requirements to:
judinfo@txcourts.gov.