

Bulletin for Court Staff

# **Guardianship Report Form Changes**

The Pennsylvania Supreme Court recently approved changes to the guardian annual report and inventory forms. These changes, effective January 1, 2023, are centered on a series of recommendations that focus on improving the overall usability of each report.

# Report Form changes and the GTS

Now that the new versions of the guardianship report forms are in effect, all unsubmitted reports in the GTS with a status of 'New' will use the latest version when they are created. This applies to a report regardless of the start and end dates of the reporting period, the due date, or whether it is created by a guardian or court staff.

Alternatively, all reports that are currently in progress or submitted will continue to reflect the version that was in effect when it was created. Likewise, when an amended report is created, the version of the report form that must be completed matches the version that was initially submitted.

The pages that follow summarize the changes to the guardianship reports.

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January 3, 2023



# Changes to the Guardian of the Person Report

# Part I, Question #3 (Report Period)

When a report has been identified as the final, the following reasons have been added or changed:

- The reason The Guardian was terminated by a court order dated has been changed to The Guardian was <u>discharged</u> by a court order dated.
- The Order for Adjudication of Capacity dated checkbox has been added. This reason is selected automatically when a case action Filing Type of 'Guardian Voluntarily Removed' and a Termination Reason of 'Restoration of Capacity' is recorded on the case. This checkbox cannot be deselected by the guardian. The filed date of the case action also displays on the report as the Court order date.
- The Limited Duration Order Expired dated checkbox has been added. This reason is selected automatically when a case action Filing Type of 'Guardian Voluntarily Removed' and a Termination Reason of 'Limited Duration Order Expired' is recorded on the case. This checkbox cannot be deselected by the guardian.

3. Report Period	
	* Report Type: Final Report
	* Report Period Start Date: 01/01/2022
	* Report Period End Date: 12/22/2022
	This Final Report is being filed for the following reason
	The death of the Incapacitated Person.:
The Guard	an was discharged by a court order dated: 🗌
	Order for Adjudication of Capacity dated: 🇹
	* Court order date: 12/22/2022
	Limited Duration Order Expired dated:

## Part II, Question 3 (Residence of the IP)

A new residence type, 'Group Home', has been added to the list of possible responses. When selected, it is necessary to specify if it's a Memory Support Facility.

3. Nature of Residence of the Incapacitated Person (Select One)		
Type of Residence/Facility	Group Home	~
* Is this a Memory Support Facility?	Yes	~



# Part V (Information about the Guardian)

Two questions (#8 and #9), related to guardian compensation, have been added. Like the Guardian of the Estate report, these questions require the guardian to specify if compensation was received, the details of the compensation (when applicable), and whether it was approved by the court.

In addition, if the guardian indicates a **Fee Frequency** of 'Hourly', the **If Hourly**, **# of Hours** field is now available to enter the number of hours the guardian completed for services rendered.

PART V. INFORMATION ABOUT THE GUARDIAN	
1. On average, how often did you visit the Incapacitated Person during the Report Period?	
* Visitation Frequency:	
2. What is the average length of a visit?	
* Visitation Duration:	
3. Have you maintained a log of your activities as a guardian?	
* Guardian Activity Log:	
4. During the report period, did any guardian participate in training or certification?	
* Guardianship Training:	
5. During this Report Period, was any guardian charged with or convicted of a crime?	
* Guardian Criminal Charges:	
6. During this Report Period, was a Protection from Abuse Order or Protection from Sexual Violence or Initimidation Order entered against any	guardian
* Guardian PFA/PFSVI Ordered:	
7. Is there any reason any guardian cannot continue to serve as guardian?	
* Guardian Cannot Continue:	
8. Did the Guardian receive compensation during the Report Period?	
* Guardian Compensation: Yes	
Complete the table below	
Amount Guardian Name Fee Frequency If Hourly, # of Hours	
15   Joseph K Zimmerman V   Hourly V   124	
9. Was the compensation approved by the court?	
* Guardian Compensation Approved: Yes	
* Guardian Compensation Order Date: mm/dd/yyyy	
inni/00/333 -	

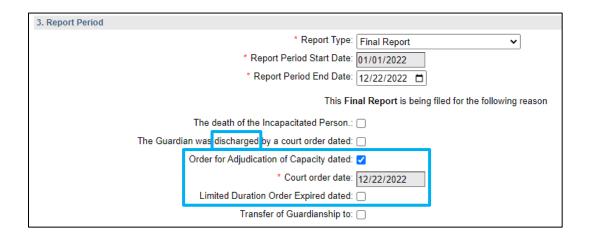


#### January 3, 2023 Changes to the Guardian of the Estate Report

## Part I, Question #3 (Report Period)

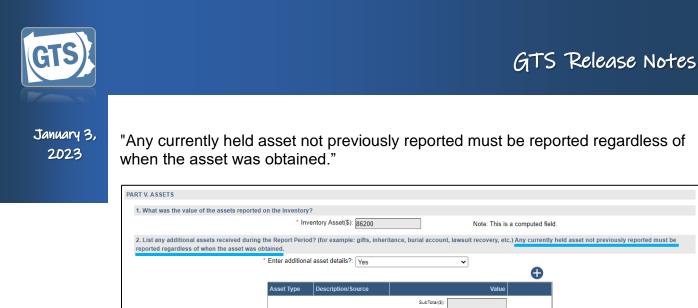
When a report has been identified as the final, the following reasons have been added or changed:

- The reason The Guardian was terminated by a court order dated has been changed to The Guardian was <u>discharged</u> by a court order dated (see next image).
- The Order for Adjudication of Capacity dated checkbox has been added. This reason is selected automatically when a case action Filing Type of 'Guardian Voluntarily Removed' and a Termination Reason of 'Restoration of Capacity' is recorded on the case. This checkbox cannot be deselected by the guardian. The filed date of the case action also displays on the report as the Court order date.
- The Limited Duration Order Expired dated checkbox has been added. This reason is automatically when a case action Filing Type of 'Guardian Voluntarily Removed' and a Termination Reason of 'Limited Duration Order Expired' is recorded on the case. This checkbox cannot be deselected by the guardian.



## Part V, Question 2 (Additional Assets)

The following text has been added to the instructions to provide a more accurate description of the information required for assets received during the reporting period:



## Part VI, Question 1 (Guardian's Compensation)

If the guardian indicated a **Fee Frequency** of 'Hourly', the **If Hourly, # of Hours** field is now available to enter the number of hours the guardian completed for services rendered.

PART VI. GUARDIAN'S COMPENSATION					
1. Did the Guardian receive compensation during the	the Report Period?				
	* Guardian Compensati	on: Yes		~	
		Complete the	e table below		
					Ð
Gua	ardian Name	Amount	Fee Frequency	If Hourly, # of Hours	
Jos	oseph K Zimmerman 🗸	15	Hourly 🗸	124	Î

#### Part VIII, Question 1B (Veterans Administration (VA) Benefits)

The term 'representative payee' has been replaced with the term 'fiduciary'. Within the GTS these two terms are synonymous, but fiduciary more clearly aligns with the terminology used by the VA.

PART VIII. REPRESENTATIVE PAYEE	
1a. Social Security Administration (SSA) benefits	
The Incapacitated Person does not receive SSA benefits:	
* Does the guardian act as the representative payee for SSA benefits?:	✓
1b. Veterans Administration (VA) benefits	
The Incapacitated Person does not receive VA benefits:	
* Does the guardian act as the fiduciary for VA benefits?:	✓ 😮





2023

## Changes to the Inventory Report

#### Part VI (Personal Care Plan)

A new question (#3) has been added which requires the entry of the IP's current residence. This response provides the court the ability to capture this information much sooner than the submission of the first Guardian of the Person and/or Estate report.

P	ART VI: PERSONAL CARE PLAN		
	4. Can the Inconscitated Demon remain in their current regidence with assistance, or in the home of a relative?		
	1. Can the Incapacitated Person remain in their current residence with assistance, or in the home of a relative?		
	* Remain in Current Residence:		
	2. Will the Incapacitated Person be moved into a supervised residential setting?		
	* Impending Relocation to supervised residential setting?:		
	3. Incapacitated Person's Current Residence		
	* Address Type: Guardian's Home 🗸		
	* Address Line 1: 111 Elm St.		
	Address Line 2:		
	* City: Sandy Ridge		
	* State: Pennsylvania 🗸 🗸		
	* Zip Code: 16677		

#### Changes applicable to all reports

#### Guardian Acknowledgment

The structure of the Orphans' Court rules referenced in the second guardian acknowledgement has been updated to reflect the recent formatting change (Example: Pa. O.C. Rule 4.3 changes to Pa.R.O.C.P. 4.3).

I, the guardian of the Estate, verify that the foregoing information is correct to the best of my knowledge, information and belief, and that this Verification is subject to the penalties of 18 Pa.C.S. § 4904 relative to unsworn falsification to authorities.
I, the Guardian of the Estate I further acknowledge the Notice of Filing must be served within 10 days of the filing of this report pursuant to Pa R.O.C.P. 14.8(b). Service
shall be in accordance with Pa.R.O.C.P. 4.3.
* Next Action: O Save
Next Action. O Save
⊖ Save and Close
○ Ready for Submission
Submit
Ok Cancel View Draft



#### Version Effective Date

When a PDF copy has been generated in the GTS for any report that includes these new form changes, the effective date of January 1, 2023 displays in the lower-left corner of each page.

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*** D R A F T ***	
COURT OF COMMON PLEAS CENTRE COUNTY, PENNSYLVANIA ORPHANS' COURT DIVISION	
<b>REPORT OF GUARDIAN OF THE PERSON</b>	
Estate of: Betts, Hannah, an Incapacitated Person	
Case File No: OC-1206-2020	
DATE COURT APPOINTED YOU AS GUARDIAN: January 01, 2021	
PART I. INTRODUCTION	
1. Name(s) of Guardian(s): Zimmerman, Joseph K; Boggs, Cameron	
2. Is this a limited Guardianship? 🔲 Yes 🗹 No	
3. Report Period	
□ This is the <b>Report</b> for the period from to (the " <b>Report Period</b> "); or	
☑ This is the Final Report for the period from December 22, 2022 to December 22, 2022 (the "Report Period	iod")
and is filed for the following reason:	
□ The death of the Incapacitated Person.	
Date of Death:	
Name of Executor/Administrator:	
<ul> <li>The Guardian was discharged by a court order dated:</li> <li>Order for Adjudication of Capacity dated:</li> </ul>	
<ul> <li>Order for Adjudication of Capacity dated:</li> <li>Limited Duration Order Expired, dated: December 22, 2022</li> </ul>	
Transfer of Guardianship to:	
Date of court order approving transfer:	
IF THIS IS A FINAL REPORT, ONLY COMPLETE PARTS I AND V.	
Form G-0: (Effective January 1, 2023)	Page 1 of 7