



Guardianship Tracking System

Bulletin for Court Staff

January 3,
2023

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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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 discharged 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 Guardian 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



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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 Intimidation 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	
<input type="text" value="15"/>	<input type="text" value="Joseph K Zimmerman"/>	<input type="text" value="Hourly"/>	<input type="text" value="124"/>	<input type="text" value="🗑️"/>

9. Was the compensation approved by the court?
* Guardian Compensation Approved: Yes
* Guardian Compensation Order Date:



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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 discharged 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.

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 Guardian was discharged by a court order dated:

Order for Adjudication of Capacity dated:

* Court order date: 12/22/2022

Limited Duration Order Expired dated:

Transfer of Guardianship to:

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:



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"Any currently held asset not previously reported must be reported regardless of when the asset was obtained."

PART V. ASSETS

1. What was the value of the assets reported on the Inventory?
 * Inventory Asset(\$): Note: This is a computed field.

2. List any additional assets received during the Report Period? (for example: gifts, inheritance, burial account, lawsuit recovery, etc.) Any currently held asset not previously reported must be reported regardless of when the asset was obtained.
 * Enter additional asset details?:

Asset Type	Description/Source	Value
		SubTotal(\$): <input type="text"/>

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 Report Period?
 * Guardian Compensation:

Complete the table below

Guardian Name	Amount	Fee Frequency	If Hourly, # of Hours
<input type="text" value="Joseph K Zimmerman"/>	<input type="text" value="15"/>	<input type="text" value="Hourly"/>	<input type="text" value="124"/>

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?:



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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.

PART VI: PERSONAL CARE PLAN

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:

* Address Line 1:

Address Line 2:

* City:

* State:

* Zip Code:

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, 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: Save
 Save and Close
 Ready for Submission
 Submit



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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

REPORT OF GUARDIAN OF THE PERSON

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 **Report** for the period from _____ to _____ (the "**Report Period**"); or

This is the **Final Report** for the period from **December 22, 2022** to **December 22, 2022** (the "**Report Period**") and is filed for the following reason:

The death of the Incapacitated Person.
Date of Death: _____
Name of Executor/Administrator: _____

The Guardian was discharged by a court order dated: _____

Order for Adjudication of Capacity dated: _____

Limited Duration Order Expired, dated: **December 22, 2022**

Transfer of Guardianship to: _____
Date of court order approving transfer: _____

IF THIS IS A FINAL REPORT, ONLY COMPLETE PARTS I AND V.

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