



# Add a Participant Alert (Abuse, Neglect, Financial Exploitation)

## 1. Initiate a search

In the General Actions section of your Dashboard, click the *Manage People and Organizations* link.

**General Actions**

- [View Notifications](#)
- [Manage Cases](#)
- [Manage People and Organizations](#)
- [PA Department of Health - Death Notices](#)
- [User Login Request Form](#)

## 2. Enter the name of the guardian

In the Participant Search screen, select 'Person' or 'Organization' from the **Search By** field and enter the participant's **Last Name** and **First Name** or **Organization Name** and/or **EIN**.

**Tip:** Partial names, with a minimum of two characters, can be used.

## 3. Limit your search

Select the **Guardians Only** checkbox.

With this action, the **Professional Guardians Only** checkbox is selected automatically. If you do not want to search for professional guardians, deselect this checkbox.

### Search by Person

**Add/Edit Case Participant** X

Search By: Person (One or more of these fields is required)

Last Name: Boggs (One or more of these fields is required)

First Name: Cameron

SSN: \_ \_ - (One or more of these fields is required)

Birth Date: mm/dd/yyyy ?

Death Date: mm/dd/yyyy ?

Guardians Only:  (One or more required)

Guardian Number:  ?

Works in County:  ?

Professional Guardians Only:  ?

Attorneys Only:

Search

### Search by Organization

**Add/Edit Case Participant** X

Search By: Organization (One or more of these fields is required)

Organization Name: Guardian Angels (One or more of these fields is required)

EIN: \_ - (One or more of these fields is required)

Guardians Only:  (One or more of these fields is required)

Guardian Number:  ?

Works in County:  ?

Professional Guardians Only:  ?

Search

## 4. Click SEARCH

## 5. Choose a guardian

Based on the search results that display, click the Edit Record icon that appears to the right of the appropriate guardian.

	Name	Type	Address	Identifiers	Active Cases	Other Info	
+	● Cameron Boggs	Guardian	341 Lincoln Ave. Sandy Ridge, PA 16677 (Home)	Guardian Number: 1200302	2		✎
<span style="border: 1px solid #ccc; padding: 2px 10px;">Select</span>							

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6. In the Edit Person / Organization screen, click the Alerts tab

Participant Information	
Name	Address
Boggs, Cameron	341 Lincoln A Sandy Ridge (Home)

Participant Alerts	
Alert Type	Descri

7. Initiate the alert

Click the Add New Alert icon.

8. Add the Alert Type

In the Alert Management popup, click on the **Alert Type** dropdown and select the option that best describes the reason for creating the alert.

**Tip** This action defaults the **Description** automatically following Step 13.

10. Verify the Alert Status

Verify that the **Alert Status** defaults to 'Active.'

12. Specify guardian notification

Click on the **Should Guardian Be Notified** dropdown and select the correct option.

**Tip** Selecting 'Yes' sends a GTS notification to the guardian.

9. Add a Court Authority

Click on the **Court Authority** dropdown and select the judge or other authority that directed the creation of the guardian alert.

11. Verify the Status Date

The **Status Date** field automatically defaults to the current date. This date can be updated if needed.

13. Click SAVE

Alert Management

\* Alert Type: Financial Exploitation

Description:

\* Court Authority: Bigham, Robert G.

\* Alert Status: Active

\* Status Date: 11/22/2022

\* Should Guardian Be Notified: No

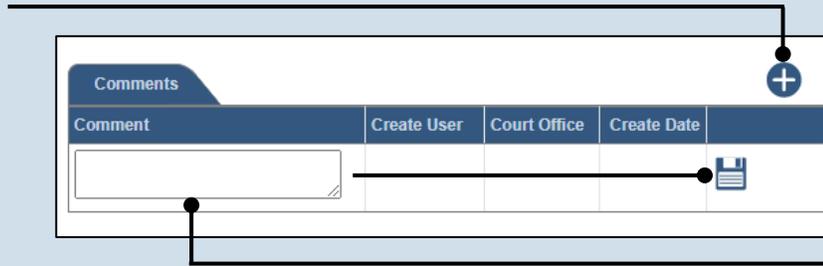
Save

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## 14. Add new comment record

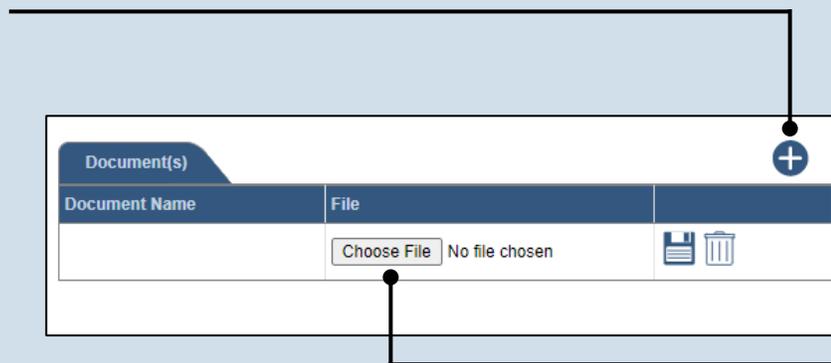
Click the Add Comment icon above the Comments grid.



**15. Add comments**  
Enter any relevant information or reasons for creating the alert and click the Save icon.

## 16. (Optional) Documents

If documents are available that corroborate the reason for the alert, and you want to make them available through GTS, click the Add Document icon and continue to Step 17.



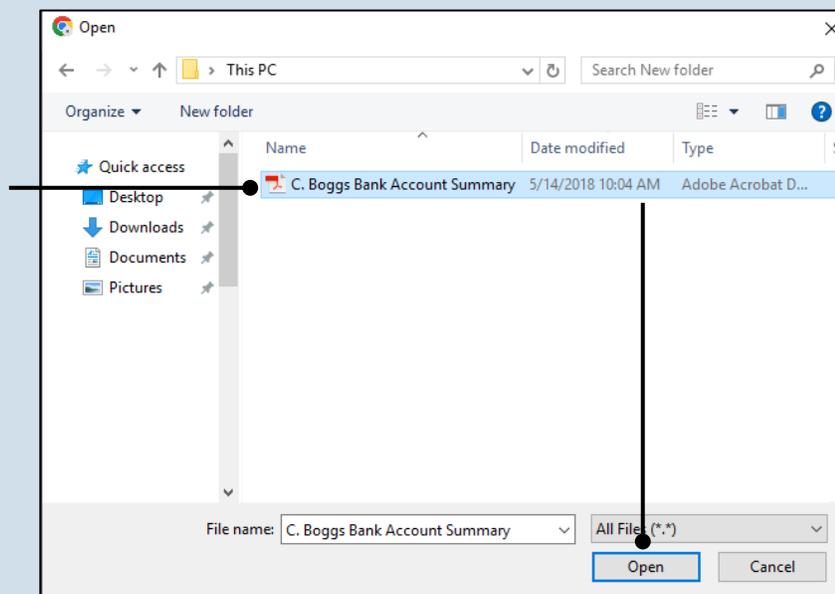
**17. (Optional) Click the CHOOSE FILE button**

Otherwise, proceed to Step 19.

## 18. (Optional) Documents (cont.)

In the popup screen that appears, locate the PDF version of the document you have saved on your computer or a movable storage device. Select the file and click OPEN.

**Tip** GTS only accepts documents in a PDF format. Documents created in Microsoft Word or Excel can be saved as a PDF using built-in tools. Other PDF making tools are available on the internet.



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## 19. Close the alert

Click the 'X' in the upper-right of the Alert Management popup.

**Tip** If the guardian files electronically through GTS, and they were designated to receive notice in Step 12, they will receive a notification that lets them know an alert has been entered against them. The same is true if/when the alert is resolved.

**Tip** Once saved, the alert will be viewable to other Orphans' Court offices through participant searches or if they attempt to add the guardian to a case.

**Tip** Alerts cannot be deleted and can only be resolved by the court that created the alert. Other courts, however, are permitted to add comments.

**Alert Management**

\* Alert Type:

Description:

\* Court Authority:

\* Alert Status:

\* Status Date:

\* Should Guardian Be Notified:

**Alert History**

Status	Status Date	Create User	Court Office	Create Date
Active	11/22/2022	aopc_admin56	Adams County Orphans' Court	11/22/2022

**Comments**

Comment	Create User	Court Office	Create Date
<input type="text"/>			

**Document(s)**

Document Name	File
No results found	