

How to Add a Report Reminder

1. Search for the case

On your Dashboard, click in the **Case File No** field, enter the number for the appropriate case, and press *[Enter]* on your keyboard.

2. In the GTS Case screen, click the Report Reminders tab

3. Create a new reminder

Click the Add Report Reminder icon.

- [Incapacitated Person](#)
- [Case Actions](#)
- [Guardians](#)
- [Other Case Participants](#)
- [Attorneys](#)
- [Reports](#)
- [Bond Ordered](#)
- [Suppressed Flags](#)
- [Report Reminders](#)

4. Enter reminder comments

In the Add/Edit Report Reminder screen, click in the **Reminder** field and enter comments related to the case that should be referenced when reviewing future guardian reports.

Tip This feature supplements the flags that may appear on Person and Estate reports. These comments serve as a reminder to inspect certain sections of a report that would not otherwise be flagged by GTS.

5. Choose affected report types

Depending on the subject and relevance of the comments entered in Step 4, select the **Annual Report of the Person** and/or **Annual Report of the Estate** checkboxes.

6. (Optional) Define how long the reminder should display

Click in the **Report Period** field and enter the four-digit year that defines the period through which the reminder should display.

7. Click SAVE