

Add an Adjudication of Incapacity Case Action



1. Search for the case

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

Find a Case

* Case File No:

OC-1102-2022

Search

Advanced Search

2. In the GTS Case screen, click on the Case Actions tab

Incapacitated Person

Case Actions

Guardians

Other Case Participants

Attorneys

Reports

Bond Ordered

Suppressed Flags

Report Reminders

3. Initiate the case action

Click the Add Case Action icon.

Case Actions

Action Date/Time

Case Action

07/11/2022 10:27 AM

Petition for Adjudication of Guardian

+

Documents

4. Select a filing type

In the Add Case Action screen, click on the **Filing Type** dropdown and select 'Final Decree – Adjudication of Incapacity/ Appointment of Guardian'.

5. Verify/update the filed date

The **Filing Date** and **Filing Time** fields automatically default to the current date/time. Update these values, as necessary, to reflect when the order was issued.

Add Case Action

* Case File No:

OC-1102-2022

* Filing Type:

Final Decree - Adjudication of Incapacity

* Filing Date:

11/21/2022

Filing Time:

11:40:00 AM

* Judicial Authority:

Gillette-Walker, Kelley

6. Choose the judicial authority

Click on the **Judicial Authority** dropdown and select the judge that issued the adjudicatory order.

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7. Identify the representation status of the incapacitated person (IP)

Click the **IP Was Represented at Hearing** dropdown and indicate if the IP was represented by an attorney at the adjudicatory hearing.

If 'Yes', continue to Step 8. If 'No', proceed to Step 10

9. Specify if the attorney was paid by the IP's estate

11. Specify if an interpreter was appointed

If 'Yes', continue to Step 12. If 'No', proceed to Step 13.

The screenshot shows the 'Add Case Action' form with the following fields and values:

- * Case File No: OC-1102-2022
- * Filing Type: Final Decree - Adjudication of Incapacity
- * Filing Date: 11/21/2022
- Filing Time: 11:40:00 AM
- * Judicial Authority: Gillette-Walker, Kelley
- IP Was Represented at Hearing: Yes
- * Attorney Was Court Appointed: Yes
- * Attorney Was Paid By Estate: Yes
- * Interpreter Was Requested: Yes
- * Interpreter Was Appointed: Yes
- * Interpreter Language: Spanish

At the bottom, there are tabs for 'Ordered', 'Domain', '* Guardianship', and '* Relief Type'. The 'Ordered' tab is currently selected.

8. Specify if the attorney was court appointed

If 'Yes', continue to Step 9. If 'No', proceed to Step 10.

10. Specify if an interpreter was requested

If 'Yes', continue to Step 11. If 'No', proceed to Step 13.

12. Specify the language

Click the **Interpreter Language** dropdown and select the language for which the interpreter was required.

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13. Identify the guardianship domain

Select the **Guardianship** checkbox for the Person and/or Estate domain as it applies to the scope of guardianship.

Domain	* Guardianship	* Relief Type
Person	<input checked="" type="checkbox"/>	Plenary
Estate	<input checked="" type="checkbox"/>	Plenary

14. Identify the relief type(s)

For each domain selected in Step 13, click the corresponding **Relief Type** dropdown and select the 'Limited' or 'Plenary' option to identify the type of relief being requested.

15. Add the ordered guardian

If the requested guardian from the petition has been appointed as the guardian, proceed to Step 27.

If the requested guardian from the petition was not appointed as the guardian, consider whether you need to remove that individual using the Delete icon, and then click the (Add Guardian) icon above the grid. Continue to Step 16.

Name	Identifiers	Person Domain	Estate Domain
Boggs, Cameron	Guardian Number: 1200302	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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

Guardians Only: ☐

16. Select a participant type

In the Add/Edit Case Participant popup, click on the **Search By** dropdown and select the appropriate option for this case action.

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17. Enter the guardian's name and any available identifiers

Based on whether you select 'Person' or 'Organization', enter the guardian's **Last Name** and **First Name** or **Organization Name** and/or **EIN**.

Tip If you want to limit your search to existing guardians, select the **Guardians Only** checkbox.

19. Create a new guardian or choose an existing record

If the correct guardian returns in your results, click the radio button that appears to the left of their name, click **SELECT**, and proceed to Step 27.

If the search returns no results or the guardian cannot be conclusively identified from the results you receive, click the Add Participant icon and continue to Step 20.

Search by Person

Add/Edit Case Participant

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

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

First Name: **Phil**

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

18. Click **SEARCH**

Search by Organization

Add/Edit Case Participant

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

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

	Name	Type	Address	Identifiers	Date o	Date c	Activ	Alerts
<input checked="" type="radio"/>	Phillip Sheridan	Guardian	5035 Ritter Road Gettysburg, PA 17325 (Home)	Guardian Number: 308			1	0

Select

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20. Verify the guardian's name information

In the Add/Edit Case Participant popup, verify the **First Name** and **Last Name** or **Organization Name** fields are correct.

Tip Any additional information about the participant can be added, if available, that uniquely identifies them (ex. Name Type, Generation, Suffix, Store/Branch, etc.).

22. (Optional) Enter the guardian's date of birth, social security number, or EIN

Add a Person

Add/Edit Case Participant

Type: Person

Name Type:

Prefix:

First Name: Phil

Middle Name:

Last Name: Sheridan

Generation:

Suffix:

Title:

Address Type: Home

Location: ☐ International ☒ United States

Address: 5095 Ritter Road

City: Mechanicsburg

State: Pennsylvania

Zip Code: 17055

County: Cumberland

Comments:

Address Unknown: ☐

Date of Birth: mm/dd/yyyy

SSN: - - -

Create

Add an Organization

Add/Edit Case Participant

Type: Organization

Organization Name: Whitfield Guardians

Store/Branch:

Location:

Address Type: Home

Location: ☐ International ☒ United States

Address: 8801 Main St.

City: Sandy Ridge

State: Pennsylvania

Zip Code: 16677

County: Centre

Comments:

Address Unknown: ☐

EIN: - - -

Create

21. Enter the guardian's address (if known)

The address entered can be a home, business, or mailing address.

If their address is unknown, select the **Address Unknown** checkbox and proceed directly to the next step.

23. Click CREATE

If the guardian is new and, therefore, does not have a GTS access code, continue to Step 24.

If the guardian already has an access code, proceed to Step 27.

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24. Generate the User Access Code Letter

In the Ordered Guardian(s) grid of the Add Case Action screen, click the Print User Access Code Letter icon appearing to the right of the appropriate guardian.

Ordered Guardian(s)					
Name	Id	Relationship To IP	Paid By County	Assigned Roles	
Sheridan, Phillip	Gu 120	<input type="text"/>	<input type="checkbox"/>		

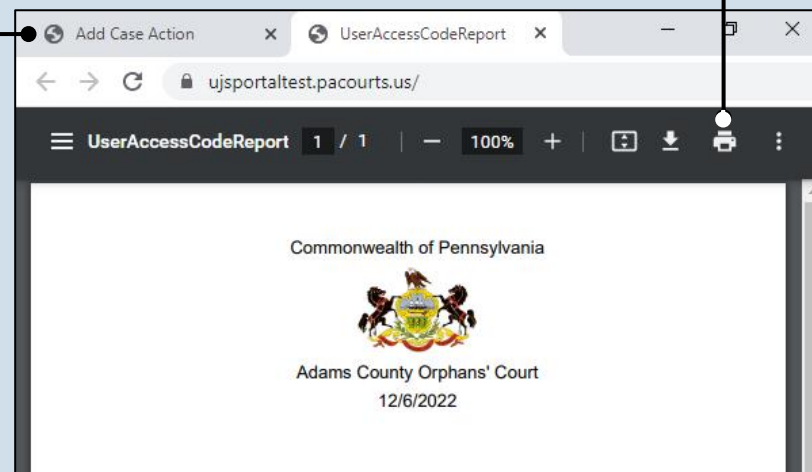
A new browser tab will open.

25. Print the Access Code Letter

26. Return to the Web Portal

Click on the web browser tab that features GTS so you can continue the creation of the case action.

When the letter opens, click the Print icon and use the subsequent Print screen to create a hardcopy.



27. Identify IP relationship

In the Add Case Action screen, click on the **Relationship to IP** dropdown and select the best option as it relates to the appointed guardian and the IP.

28. (Optional) Add other guardians

If there are additional guardians of the person, repeat Steps 15-27 as needed.

Ordered Guardian(s)					
Name	Id	Relationship To IP	Paid By County	Assigned Roles	
Boggs, Cameron	Gu 120	Relative	<input type="checkbox"/>		

Tip Select the **Paid by County** checkbox if the guardian receives payment from the county for their guardianship services.

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29. Is the guardian an organization?

If the guardian is an organization, and you know the principal and responsible agent, continue to Step 30.

If the guardian is not an organization, or it is an organization but you do not have the principal and responsible agent information, proceed to Step 37.

Ordered Guardian(s)	
Name	Identifiers
Guardian Angels	EIN: 111111111 Guardian Number: 209
Cameron Boggs	Guardian Number: 1200302



30. Add the principal(s)

Click the (Add Principal/Responsible Agent) icon for the corresponding organization.

31. Select the principal(s)

In the Add/Edit Case Participant popup, if a principal(s) is associated to the selected organization, their name(s) appears automatically. Click the checkbox for each individual that is identified as a principal on the petition and click the SELECT button. Proceed to Step 35.

If the appropriate principal does not display, then they must be associated to the organization. Click the Add Personnel icon and continue to Step 32.

Add/Edit Case Participant

Agency Personnel(s)

<input checked="" type="checkbox"/>	Name	Identifiers	Assigned Role
<input checked="" type="checkbox"/>	Guardian, Alex	Guardian Number: 1200203	Principal

Select

Add/Edit Case Participant

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 are required)

Guardian Number: ?

Works in County: ?

Professional Guardians Only: ?

Attorneys Only: ?

Search

	Name	Type	Address	Identifiers	Date o	Date c	Activ	Alerts
<input checked="" type="radio"/>	Phillip Sheridan	Guardian	5035 Ritter Road Gettysburg, PA 17325 (Home)	Guardian Number: 308			1	0

Select

32. Search for the principal

Use Steps 16-18 as a guide to determine if a participant record exists.

If the correct participant returns in your results, click the radio button that appears to the left of their name and proceed to Step 35.

If the search returns no results, or the individual cannot be conclusively identified from the results you receive, click the Add Participant icon and continue to Step 33.

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33. Create a new principal participant

Use Steps 19-23 as a guide to create the new participant record and add them to the case.

Add/Edit Case Participant

* Type: Person

Name Type:

Prefix:

First Name: Phil

Middle Name:

* Last Name: Sheridan

Generation:

Suffix:

Title:

* Address Type: Home

Location: ☐ International ☒ United States

* Address: 5095 Ritter Road

* City: Mechanicsburg

* State: Pennsylvania

* Zip Code: 17055

* County: Cumberland

Comments:

Address Unknown: ☐

Date of Birth: mm/dd/yyyy

SSN: - - -

Agency Personnel Role:

Create

34. (Optional) Add other principal(s)

Use Steps 30-33 as a guide to add additional principals.

35. Add the responsible agent(s)

Use Steps 30-33 as a guide to associate the responsible agent(s) to the case.

Add/Edit Case Participant

Agency Personnel(s)

	Name	Identifiers	Assigned Role	
<input checked="" type="checkbox"/>	Guardian, Alex	Guardian Number: 1200203	Principal	
<input checked="" type="checkbox"/>	Sheridan, Phillip	Guardian Number: 308	Responsible Agent	

Select

36. (Optional) Add other responsible agent(s)

If there are additional responsible agents, repeat Step 35 as needed.

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37. Identify domains for ordered guardian(s)

Select (or verify) the **Person Domain** and/or **Estate Domain** checkboxes, as they apply, for the ordered guardian(s).

Ordered Guardian(s)			
Name	Identifiers	Person Domain	Estate Domain
Boggs, Cameron	Guardian Number: 1200302	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Buttons: +, trash, print

Document(s)	
Document	File
	<input type="button" value="Choose File"/> No file chosen

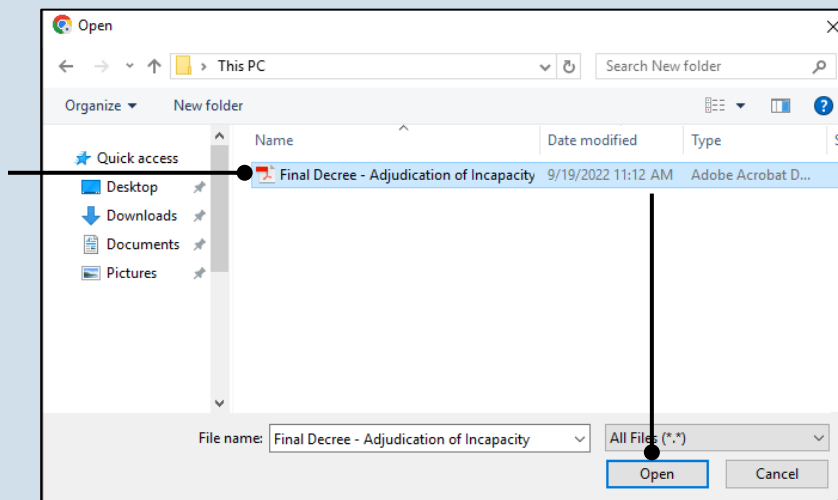
38. (Optional) Begin the process of uploading the order

Click the CHOOSE FILE button.

39. Upload the electronic version of the petition

In the popup screen that appears, locate the electronic version of the order that is saved on your computer or office shared drive. Select the file and click the OPEN button.

Tip Only electronic documents saved as a PDF can be uploaded to GTS. 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.



Tip If you are not uploading an electronic version of the order to GTS, proceed to Step 40.

Document(s)	
Document	File
	<input type="button" value="Choose File"/> No file chosen

Buttons: Ok

40. Save the case action

In the Add Case Action screen, click OK.