



# Add a Final Accounts Filed 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:

[Advanced Search](#)

## 2. On the GTS Case screen, click 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 Guardian
09/19/2022 10:34 AM	Final Decree - Adjudication Guardian

	Documents	
alley		
Orphans'		

## 4. Select a filing type

In the Add Case Action screen, click on the **Filing Type** dropdown and select 'Final Accounts Filed.'

## 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:

\* Filing Type:

\* Filing Date:

Filing Time:

Filer(s)		
<input type="checkbox"/>	Name	Assigned Roles
<input type="checkbox"/>	Boggs, Cameron	Petitioner Guardian

**Tip** If the accounting is waived by the court, 'Order of Court – Accounting Waived' can also be selected.

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## 6. Add the filer

If the name of the filer displays, select the checkbox for that individual/organization, and proceed to Step 12.

Filer(s)	Name	Assigned Roles
<input checked="" type="checkbox"/>	Boggs, Cameron	Petitioner Guardian

If the filer does not display, because they are not the petitioner or the appointed guardian, click the (Add Other Filer) icon and continue to Step 7.

Add/Edit Case Participant

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

Guardians Only:    
    
 Organization   
 Person

## 7. Select a participant type

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

## 8. Enter the filer's name and any available identifiers

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

Search by Person

Add/Edit Case Participant

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

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

First Name:

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

Birth Date:

Death Date:

Guardians Only:  (One or more or required)

Guardian Number:

Works in County:

Professional Guardians Only:

Attorneys Only:

Search by Organization

Add/Edit Case Participant

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

Organization Name:  (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:

## 9. Click SEARCH

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## 10. Identify the filer

If the correct filer returns in your results, click the radio button that appears to the left of their name and click the SELECT button.

Name	Type	Address	Identifiers	Date o	Date c	Activ	Alerts
Phillip Sheridan	Guardian	5035 Ritter Road Gettysburg, PA 17325 (Home)	Guardian Number: 308			1	0

## 11. Confirm the filer

In the Add Case Action screen, select the checkbox for the participant you just added.

## 12. (Optional) Begin the process of uploading a document

Click the CHOOSE FILE button.

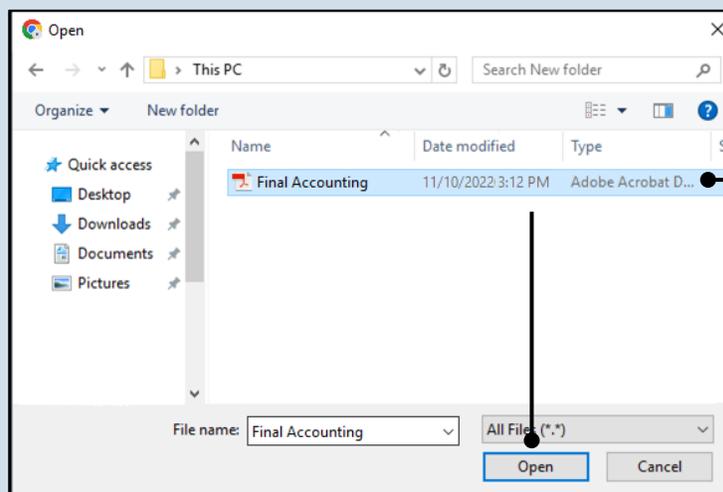
**Tip** If you are not uploading an electronic document to GTS, proceed to Step 14.

Name	Assigned Roles
<input checked="" type="checkbox"/> Phillip Sheridan	
<input type="checkbox"/> Boggs, Cameron	Petitioner Guardian

## 13. Upload the electronic version of the document

In the popup screen that appears, locate the electronic version of the document 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.



# Add a Final Accounts Filed Case Action



## 14. Save the case action

In the Add Case Action screen, click the OK button.

**Add Case Action**

\* Case File No:

\* Filing Type:  ?

\* Filing Date:  📅

Filing Time:  ⌚

**Filer(s)** +

<input checked="" type="checkbox"/>	Name	Assigned Roles	
<input checked="" type="checkbox"/>	Boggs, Cameron	Petitioner Guardian	

Comments:

**Document(s)**

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