



Add a Case Action

(except Adjudication of Incapacity)

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. In 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 of Guardian
09/19/2022 10:34 AM	Final Decree - Adjudication of Guardian

	Documents	
elley		
Orphans'		

Add a Case Action (except Adjudication of Incapacity)



4. Select a filing type

In the Add Case Action screen, click on the **Filing Type** dropdown and select the appropriate case action.

- If you choose 'Guardian Involuntarily Removed' or 'Guardian Voluntarily Removed', you must enter a **Termination Reason** and specify which guardian(s) to remove.

- If you choose 'Order – Invasion of Principal Granted', you must enter an **Allowed Amount** and **Time Period**.

- If you choose 'Petition for Extraordinary Condition Permission', you must select an **Extraordinary Condition**.

Tip The available case actions have been specifically chosen for reporting purposes. Refer to the *Available Case Actions* reference guide to see the full list of actions that can be filed in GTS.

Tip If you want to add the case action 'Final Decree – Adjudication of Incapacity/ Appointment of Guardian', refer to the *Add an Adjudicatory Case Action* reference guide.

Add Case Action

* Case File No:

* Filing Type:

* Filing Date:

Filing Time:

* Judicial Authority:

* Case File No:

* Filing Type:

* Filing Date:

Filing Time:

* Judicial Authority:

* Termination Date:

* Termination Reason:

Comments:

Guardian(s) to Remove					
Name	Identifiers	Person Domain	Estate Domain	Remove From Domain	Alert Guardian
Boggs, Cam	Guardian Number: 120	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text"/>
Boggs, Cam	Guardian Number: 120	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text"/>

* Case File No:

* Filing Type:

* Filing Date:

Filing Time:

* Judicial Authority:

* Allowed Amount(\$):

* Time Period From:

* Time Period To:

* Case File No:

* Filing Type:

* Filing Date:

Filing Time:

Filer(s)

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

* Extraordinary Condition:

Add a Case Action (except Adjudication of Incapacity)



5. Verify/update the filed date

These fields automatically default to the current date/time. Update these values, as necessary, to reflect when the case action was filed.

Add Case Action

* Case File No: OC-1101-2022

* Filing Type: Order - Allowance/Relief

* Filing Date: 11/19/2022

Filing Time: 11:09:36 AM

* Judicial Authority: Gillette-Walker, Kelley

Comments:

Document(s)

Document	File
	Choose File No file chosen

Ok Cancel

6. Choose the filer

One of two options appears depending on the selected case action:

If the case action is the result of a court filing, click on the **Judicial Authority** dropdown and select the judge that issued the order. Proceed to Step 15.

If the case action is the result of a participant filing, select the checkbox for the appropriate participant and proceed to Step 15. If the correct filer is unavailable to select, click the Add Other Filer icon and continue to Step 7.

Add Case Action

* Case File No: OC-1101-2022

* Filing Type: Petition for Extraordinary Condition F

* Filing Date: 11/19/2022

Filing Time: 11:09:36 AM

Filer(s)

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

+ Add Other Filer

* Extraordinary Condition: Consent of Divorce

7. Select a participant type

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

Add/Edit Case Participant

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

Guardians Only:

- Organization
- Person

Add a Case Action (except Adjudication of Incapacity)



8. Enter the participant's name and any available identifiers

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

Tip If you want to limit your search to existing guardians or Pennsylvania bar attorneys, select the **Guardians Only** and/or **Attorneys Only** checkbox.

10. Create a new participant or choose an existing record

If the correct participant returns in your results, click the radio button that appears to the left of their name, click **SELECT**, and proceed to Step 15.

If the search returns no results, or the participant cannot be conclusively identified from the results you receive, click the Add Participant icon and continue to Step 11.

Search by Person

Add/Edit Case Participant
✕

Search By: Person (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 are required)

Guardian Number: ?

Works in County: ?

Professional Guardians Only: ?

Attorneys Only:

9. Click SEARCH

Search by Organization

Add/Edit Case Participant
✕

Search By: Organization (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: ?

Attorneys Only:

Birth Date: 📅

Death Date: 📅

Guardians Only: (One or more are required)

Guardian Number: ?

Works in County: ?

Professional Guardians Only: ?

Attorneys Only:

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

Add a Case Action (except Adjudication of Incapacity)



11. Verify the participant'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.).

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

Add a Person

Add an Organization

12. Enter the participant'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

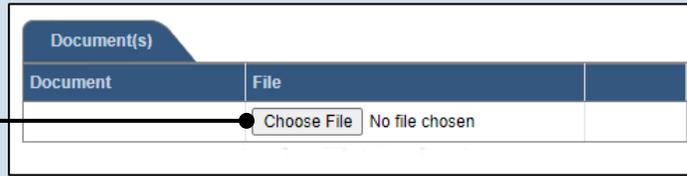
14. Click CREATE

Add a Case Action (except Adjudication of Incapacity)

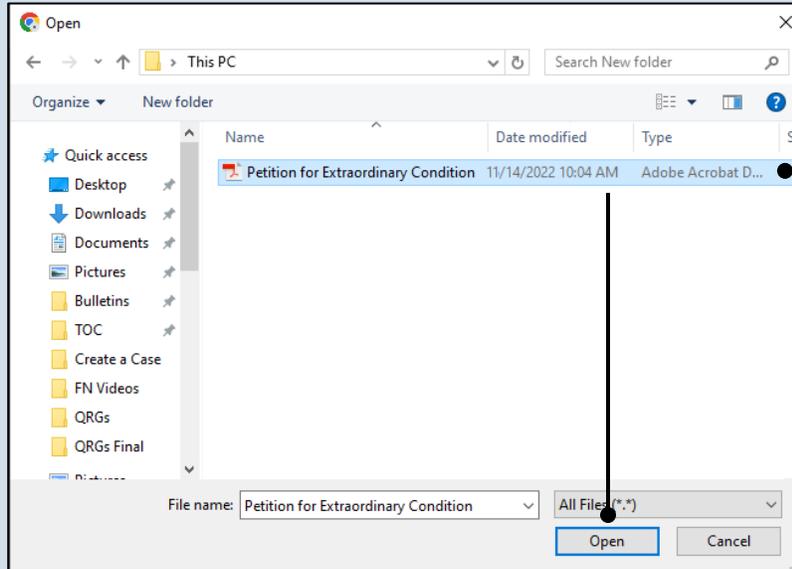


15. (Optional) Begin the process of uploading a document

In the GTS Case screen, click the CHOOSE FILE button.



Tip If you are not uploading an electronic version of the document that prompted the case action, proceed to Step 17.



16. Upload the electronic version of the petition

In the popup that appears, locate the electronic version of the document on your computer or office shared drive. Select the file and click OPEN.

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.

17. Save the case action

In the GTS Case screen, click OK.

