



Guardianship Tracking System

Release Notes for Court Staff

September 15,
2025

Guardianship Report Form Changes

The Pennsylvania Supreme Court has recently approved changes to the guardian annual report and inventory forms. These changes, effective September 14, 2025, are centered on a series of recommendations that focus on expanded data collection and improved usability of each report.

Report Form changes and the GTS

Now that the new versions of the guardianship report forms are in effect, all unsubmitted reports in the GTS with a status of 'New' will use the latest version when they are created. This applies whether the report is created by a guardian or court staff.

Alternatively, all reports that are currently in progress, returned for correction, or submitted will continue to reflect the version that was in effect when it was created. Likewise, when an amended report is created, the version of the report form that must be completed matches the version that was initially submitted.

The pages that follow summarize the changes to the guardianship reports.

Changes to the Guardian of the Estate Report	Page 2
Changes to the Guardian of the Person Report	Page 5
Changes to the Inventory Report	Page 6
Changes applicable to all reports	Page 7



September 15,
2025

Changes to the Guardian of the Estate Report

Part I, Questions 4-6 (Introduction)

These new and related questions require the entry of the address where the IP is currently living, the type of residence or facility in which they are living, and whether the IP moved during the reporting period.

4. Where is the Incapacitated Person physically living?	
* Address Line 1:	417 Elm St.
Address Line 2:	
* City:	Butler
* State:	Pennsylvania ▼
* Zip Code:	16001
5. Nature of Residence of the Incapacitated Person (Select One)	
* Type of Residence/Facility:	Your home ▼
6. Has the Incapacitated Person moved during the Report Period?	
* Incapacitated Person Relocated:	Yes ▼
* Relocation Date:	02/27/2025 📅
* Relocation Reason:	Please see attached document 'EGB gu
* Previous residence/address:	500 Front Street Butler, PA 16001

These questions mimic those that already appear in the Guardian of the Person report.

Part I, Questions 7-9 (Introduction)

These new and related questions require the identification of the IP's gender, race, and ethnicity.

7. What is the Gender of the Incapacitated Person?	
* Gender:	Female ▼
8. What is the Race of the Incapacitated Person?	
* Race:	White ▼
9. What is the Ethnicity of the Incapacitated Person?	
* Ethnicity:	Non Hispanic ▼

For ethnicity, the choices are limited to 'Hispanic', 'Non-Hispanic', and 'Unknown'. The federal government defines 'Hispanic' as a person of Cuban,



September 15,
2025

Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin, regardless of race. This includes aspects such as language, customs, traditions, and ancestry that connect people to one of these cultural groups.

Part I, Questions 10-12 (Introduction)

These new and related questions require the guardian to provide their opinion on whether the guardianship should continue and whether they've filed a petition for modification or termination during the reporting year.

10. Does the Incapacitated Person still require a guardian? Should the guardianship be

* Guardian Opinion: Continued

11. Provide the reasons for your opinion. List specific recommended modifications

Guardian Opinion Detail: The IP remains unable to make informed decisions about their personal or financial affairs due to ongoing cognitive impairments. Continued guardianship ensures their safety, well-being, and

(273 characters remaining)

12. Have you filed a petition for modification or termination?

* Petition to modify/terminate filed: No

These questions mimic those that already appear in the Guardian of the Person report.

Part II, Question 1 (Income)

Notable phrasing changes have been made within the list of available income types:

- 'Social Security (Retirement, Disability, and SSI)'
has changed to:
'Social Security (Retirement, Disability, SSI, and other SSA benefits)'
- 'Pension/Retirement Benefits (for example: 401(k), 403(b), etc.)'
has changed to:
'Pension/Retirement Benefits'



September 15,
2025

- 'IRA Distributions'

has changed to:

'IRA Distributions (for example: 401(k), 403(b), etc.)'

Part III, Question 1 (Annual Expenses)

Two new expense types are now available:

- 'Filing Fees'
- 'Legal Fees'

Part III, Question 3 (Annual Expenses)

This new question asks whether any gift expenses, personal or charitable, were incurred during the reporting year. If the answer is 'Yes', it is necessary to provide an itemized list of those expenses. Each gift expense must assert that a court order was obtained to incur the expense or a summary must be provided that explains why the expense was incurred without the court's permission.

3. Was a gift or charitable expense recorded in this Report Period?

* Gift Expense: Yes

If yes, provide the following information

Recipient	Was a court order obtained	Court Order Date	Explanation	Amount	
Disabled American Veteran	Yes	04/21/2025		150	

This information supplements and expands upon the entry of a 'Gifts – Personal or Charitable' line item recorded under Part III, Question 1, which only requires the entry of an aggregate total for all gift expenses.

Part VIII, Question 1B (Veterans Administration (VA) Benefits)

The phrasing of this question has changed from:

Veterans Administration (VA) benefits

to:

Veterans Affairs (VA) benefits



September 15,
2025

Changes to the Guardian of the Person Report

Part II, Question 2 (Personal Information About the Incapacitated Person)

The phrasing of this question has changed from:

Incapacitated Person's Current Residence

to:

Where is the Incapacitated Person physically living?

Part II, Questions 6-8 (Personal Information About the Incapacitated Person)

These new and related questions require the identification of the IP's gender, race, and ethnicity.

6. What is the Gender of the Incapacitated Person?	
* Gender:	Female ▼
7. What is the Race of the Incapacitated Person?	
* Race:	White ▼
8. What is the Ethnicity of the Incapacitated Person?	
* Ethnicity:	Non Hispanic ▼

Refer to the corresponding change in the Guardian of the Estate report (pg. 2) for more information on ethnicity.

Part IV, Question 1 (Guardian's Opinion)

The phrasing of this question has changed from:

Should the guardianship be

to:

Does the Incapacitated Person still require a guardian? Should the guardianship be



September 15,
2025

Changes to the Inventory Report

Part III, Question 1 (Annual Income)

Notable phrasing changes have been made within the list of available income types:

- 'Social Security (Retirement, Disability, and SSI)'
has changed to:
'Social Security (Retirement, Disability, SSI, and other SSA benefits)'
- 'Pension/Retirement Benefits (for example: 401(k), 403(b), etc.)'
has changed to:
'Pension/Retirement Benefits'
- 'IRA Distributions'
has changed to:
'IRA Distributions (for example: 401(k), 403(b), etc.)'

Part VI, Questions 4-6 (Personal Care Plan)

These new and related questions require the identification of the IP's gender, race, and ethnicity.

4. What is the Gender of the Incapacitated Person?	
* Gender:	Female ▼
5. What is the Race of the Incapacitated Person?	
* Race:	White ▼
6. What is the Ethnicity of the Incapacitated Person?	
* Ethnicity:	Non Hispanic ▼

Refer to the corresponding change in the Guardian of the Estate report (pg. 2) for more information on ethnicity.



September 15,
2025

Changes applicable to all reports

Version Effective Date

When a PDF copy has been generated in the GTS for any report that includes these new form changes, the effective date of September 15, 2025 displays in the lower-left corner of each page.