



GUARDIANSHIP
TRACKING SYSTEM



Reference Guides

Court
Edition (Abridged)

<https://ujportal.pacourts.us>

Version 4



Introduction

This is a collection of step-by-step documents, referred to as reference guides, which are intended to provide assistance with some of the more common processes in the Guardianship Tracking System (GTS).

Each guide is targeted to a particular task and includes both mandatory and optional steps to try and assist you with a wide-range of GTS functions. On occasion, you may need to decide what steps apply to you based on the task you are attempting to complete. Furthermore, please note that the pictures appearing in these guides are for reference purposes only and the information displayed is not likely to match what you will see or enter on your screen.

Within this document, each reference guide is grouped by topic. For example, any guides related to “case participants” are contained within a single section. Depending on the overall task you are attempting to accomplish, you may need to utilize multiple guides from one or more of these sections.

When you have completed a reference guide you will see the word ‘END’ in the bottom left corner of the last page.

Depending on your use of GTS, it’s possible that you may not use all the reference guides available in this book.

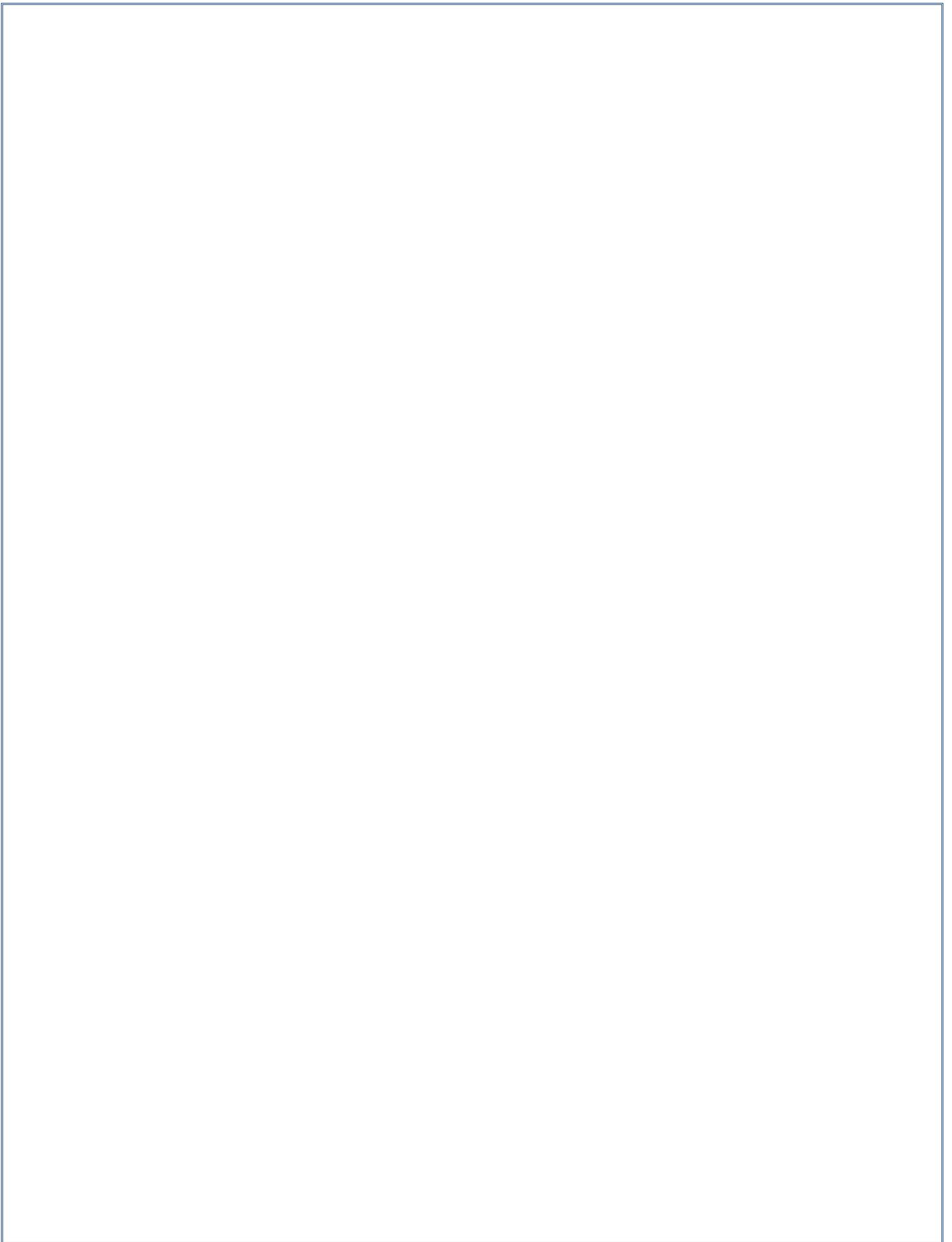
Table of Contents

Case View

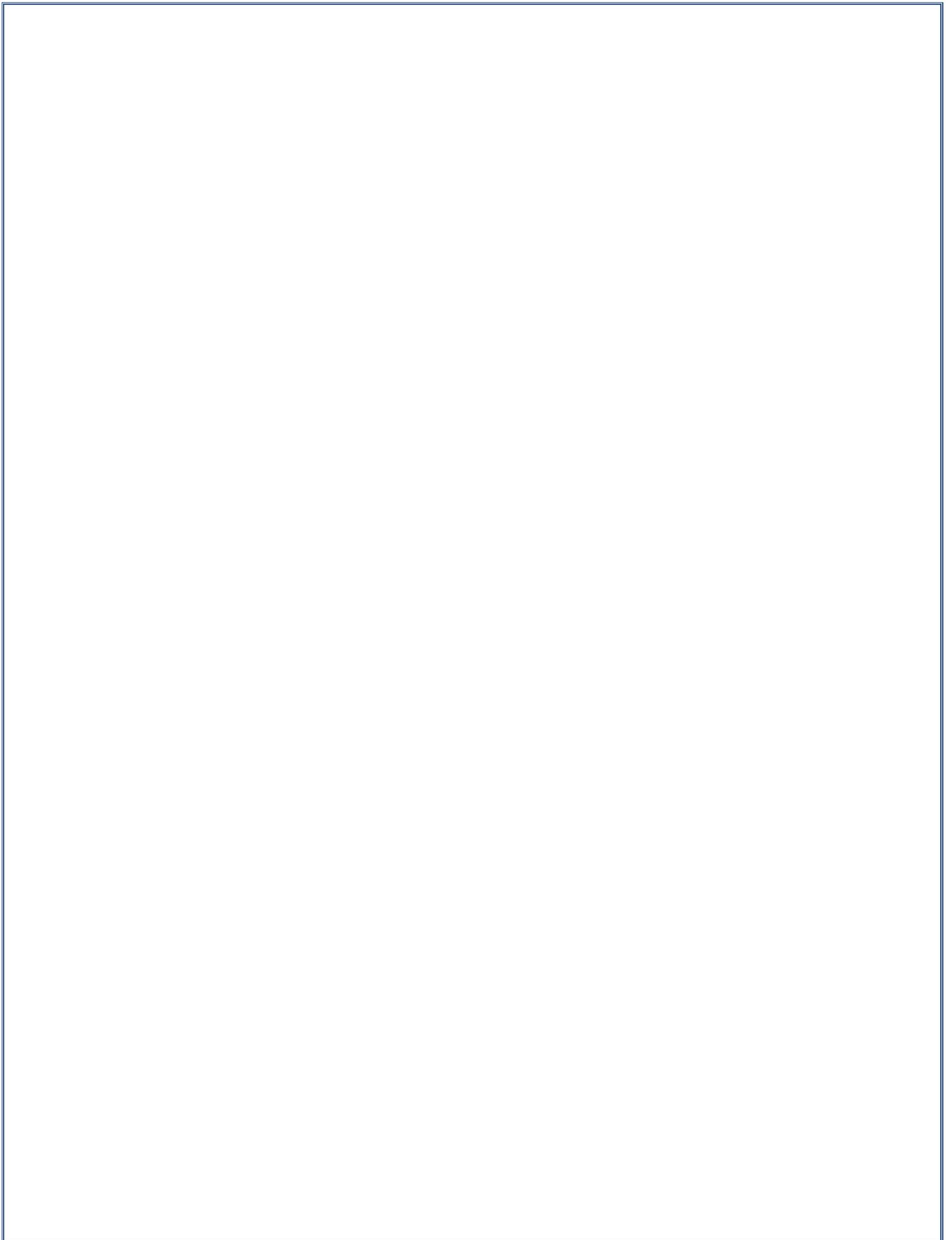
The GTS Dashboard Quick Sheet.....	1
Viewing the Guardianship Case Management Screen.....	3
How to Search for a case (Advanced Search).....	5

Working with Reports

How to Review a Report	7
How to Add or Update Flags on a Report	9



Case View





GTS Court User Dashboard Quick Sheet

➤ Match any number below to the same number in the table to learn more about the corresponding Dashboard feature. Some features are not available to all users

Court User Dashboard

Upcoming and Overdue Reports (3) Submitted Reports (1) Ready For Review (1)

Case File No.	Incapacitated Person	Report	Final	Due	Last Action	Last Action Date	Next Action	ENotice Sent	Comment	Other Info
OC-10101-2021	Goodman, Brian	Estate		11/23/2022 (19 days overdue)			Send Overdue Letter			I
OC-10101-2021	Goodman, Brian	Person		11/23/2022 (19 days overdue)			Send Overdue Letter			I I
OC-1001-2021	Hollings, Kathryn	Inventory		11/7/2022 (3 days overdue)			Send Overdue Letter			I

Find a Case
 Case File No.
 Search
 Advanced Search

General Actions
[View Notifications](#)
[Manage Cases](#)
[Manage People and Organizations](#)
[PA Department of Health - Death Notices](#)
[User Login Request Form](#)

Reports
[View All Reports](#)
[View Adhoc Reports](#)
[Act 24 Report](#)

Recent News
[Latest GTS News](#)
 Updated: 9/13/2022

- 1. Upcoming and Overdue Reports** – Displays all reports that are overdue from a guardian or will be due within the next 30 days. Allows reminders and overdue notices to be printed, which can be sent to the guardian.
- 2. Submitted Reports** – View reports that have been submitted by guardians and either approve them or return them for corrections.
- 3. Ready for Review** – View reports that were submitted and approved. Review the reports to add or update flags. Once flags are resolved, report can be marked as reviewed.
- 4. Print Tracking Report** – Generates the Overdue and Upcoming Report Tracking report for the cases selected in the Upcoming and Overdue Reports section of the Dashboard. The report displays the due date for each report and the last action that was taken on the case with regard to notices.

- 5. Perform Next Action** – Generates the next reminder or overdue notice for the cases selected in the Upcoming and Overdue Reports section of the Dashboard.
- 6. Find a Case** – Search for a case and view the corresponding case details.
- 7. View Notifications** – View all notifications regarding the status of filings submitted by guardians and upcoming and overdue reports.
- 8. Manage Cases** – Search for guardianship cases using the case file number, filing date, or any case participant.
- 9. Manage People and Organizations** – Search for people, including guardians and all Pennsylvania attorneys, and organizations with a UJS Web Portal account.

GTS Guardian Dashboard Quick Sheet



- | | |
|--|---|
| <p>10. PA Department of Health – Death Notices – Search for the Pennsylvania Department of Health death certificates for individuals.</p> <p>11. User Login Request Form – Provides access to a PDF fillable form that is used to request, modify, or remove access to the GTS for existing or former court staff.</p> <p>12. View All Reports – Search for all reports submitted by a guardian or guardian organization. The results can be filtered by report status, submission dates, and the presence of actionable flags.</p> | <p>13. View Adhoc Reports – Provides access to a number of GTS management reports.</p> <p>14. Act 24 Report – Provides the ability to generate interim or final versions of this annual statistical report based on the available data in the GTS for your county.</p> <p>15. Recent News – Opens the 'GTS News' section of the Help and displays any information that has been published which affects the court's, or the guardian's, use of the GTS. The date that appears indicates the last time information was published.</p> |
|--|---|

Viewing the GTS Case Screen



1. Access the GTS Case screen

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

Find a Case

* Case File No:

OC-1011-2018

Search

[Advanced Search](#)

GTS Case - OC-12-2023 - Guardianship of DeGroff, Patricia

General Information						
Judicial Authority	Is Sealed ?	Filing Fees Waived ?	Case Status	Requested Domain	Ordered Domain	Has Notes
	<input type="checkbox"/>	<input type="checkbox"/>	Adjudicated (Plenary) Incapacitated (Plenary)	Person (Plenary)	Estate (Plenary)	

- Incapacitated Person
- Case Actions
- Guardians
- Other Case Participants
- Attorneys
- Reports
- Bond Ordered
- Suppressed Flags
- Report Reminders

Person Info

Age At Petition	Current Age	Unhoused	IFP Status
91	93	<input type="checkbox"/>	

Representatives

Attorney Name	Appointment Date	Paid By County
Luedtke, Katrina		

2. Review the information, organized into tabs on the left side of the screen

Tip See the list below for the information available in each tab.

The sections of the Case Management screen contain the following:

- **General Information** – Displays basic information about the case such as the case status and state, the judicial authority, the requested guardianship domains, and the ordered guardianship domains (if the case was adjudicated incapacitated).
- **Incapacitated Person** – Displays by default when the GTS Case screen opens. Contains information on the incapacitated person (IP) that is the subject of the case including their age, date of birth, addresses, unhoused (homelessness) indicator, contact details, and representation information.
- **Case Actions** – Displays all case actions that have been recorded on the case. The **Documents** column provides the ability to open any documents that were associated with the filing and uploaded when recording the case action. Click the View Case Action icon associated with a case action to view additional details.
- **Guardians** – Lists the guardians that have been requested (proposed) or appointed for the IP. Click the Edit Guardian icon associated with a guardian to view additional details.
- **Other Case Participants** – Lists all interested parties and their relationship to the IP. Any party with the **Has Secure Access** checkbox selected can view case details and documents on this case in GTS. Click the Edit Case Participant icon associated with the participant to view additional details. Additional functions include removing case participants and adding additional case participants.

Viewing the GTS Case Screen



- **Other Case Participants** – Lists all interested parties and their relationship to the IP. Any party with the **Has Secure Access** checkbox selected can view case details and documents on this case in GTS. Click the Edit Case Participant icon associated with the participant to view additional details. Additional functions include removing case participants and adding additional case participants.
- **Attorneys** – Displays the attorneys for the incapacitated person, guardians, and any other parties on the case. Click the Edit Attorney Details icon associated with the attorney to view additional details. Additional functions include removing attorneys and adding additional attorneys.
- **Reports** – Lists all reports that have been submitted for the IP and any reports that are eligible for submission. Additional functions include the ability to enter the reports in GTS when the guardian submits a paper filing by use of the Amend Report or Create Report icons associated with each report.
- **Bond Ordered** – This tab is used to record the details of a bond when ordered by the judge or indicate that a bond has been waived. Also displays any bonds that have been issued for the case and the effective and expiration dates. Click the Edit Posted Bond icon associated with a posted bond to view additional details. Additional functions include the ability to post additional bonds and remove posted bonds.
- **Suppressed Flags** – Lists any report flags that have been suppressed. Additional functions include adding new suppressed flags and removing suppressed flags.
- **Report Reminders** – Displays any report reminders that have been added for guardian reports. The reminders display when reviewing the reports that were submitted through the reporting year that is displayed in the **Display Through Report Period** column in the grid. The grid also displays if the reminder displays for the Annual Report of the Person, the Annual Report of the Estate, or both reports. Click the Edit Report Reminder icon associated with the report reminder to view additional details. Additional functions include the ability to add other report reminders, edit reminders, and remove report reminders.



Searching for a Case (Advanced Search)

➤ This reference guide can be used to locate and open a case when the case file number is not known.

1. Access the Guardian Case Search screen

In the Find a Case area of your Dashboard, click the *Advanced Search* link.

3. Enter the search criteria

Enter the information you have available for the search.

Tip Depending on the **Search Type** selected, some fields may be required.

Tip Try searching with less criteria to begin with. If too many results are returned, add additional criteria to narrow the search.

2. Select the Search Type

On the Guardian Case Search screen, search criteria fields display based on the type selected.

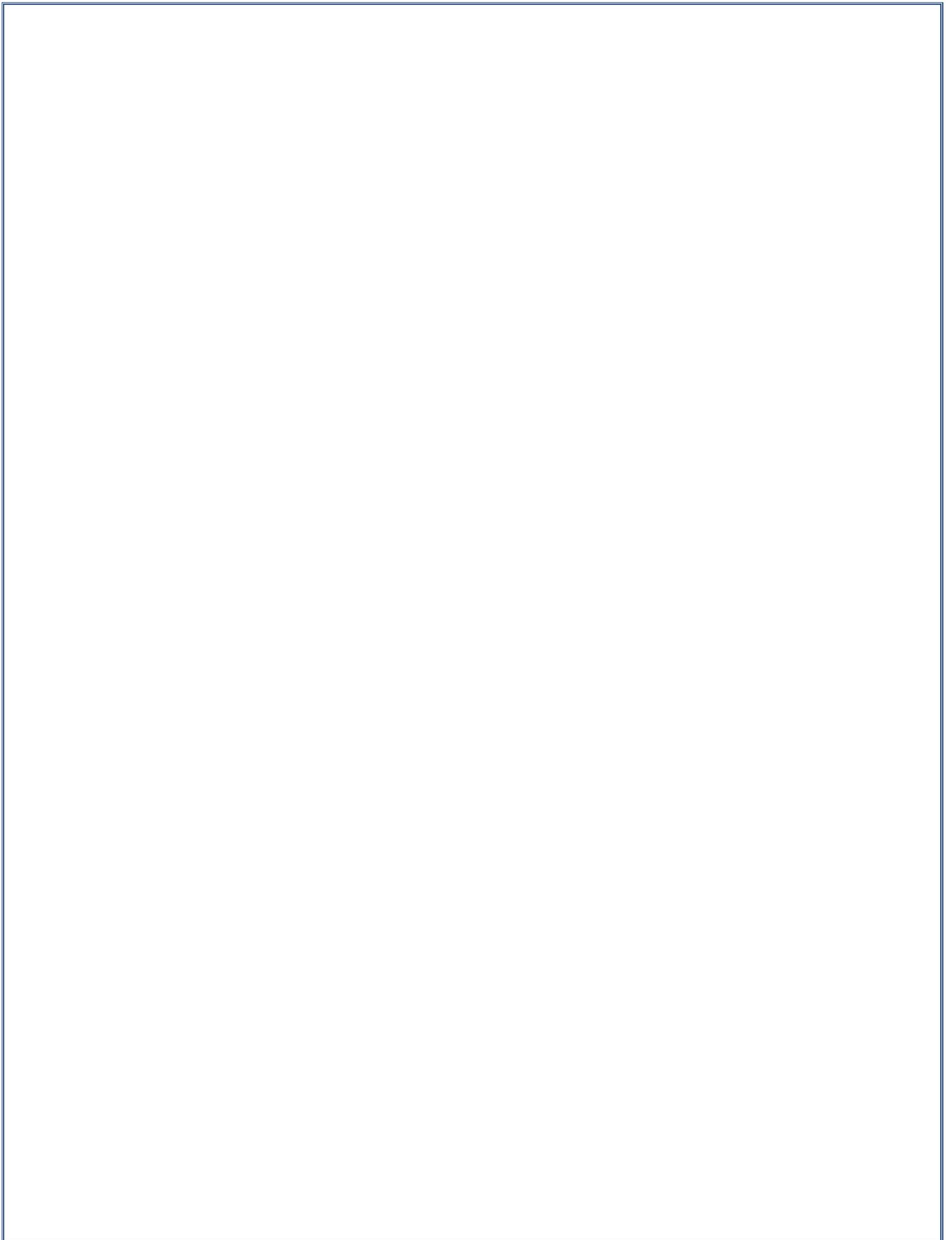
4. Click SEARCH

Tip If the search does not return the case you are looking for, repeat Steps 3 – 4 using different information for the search.

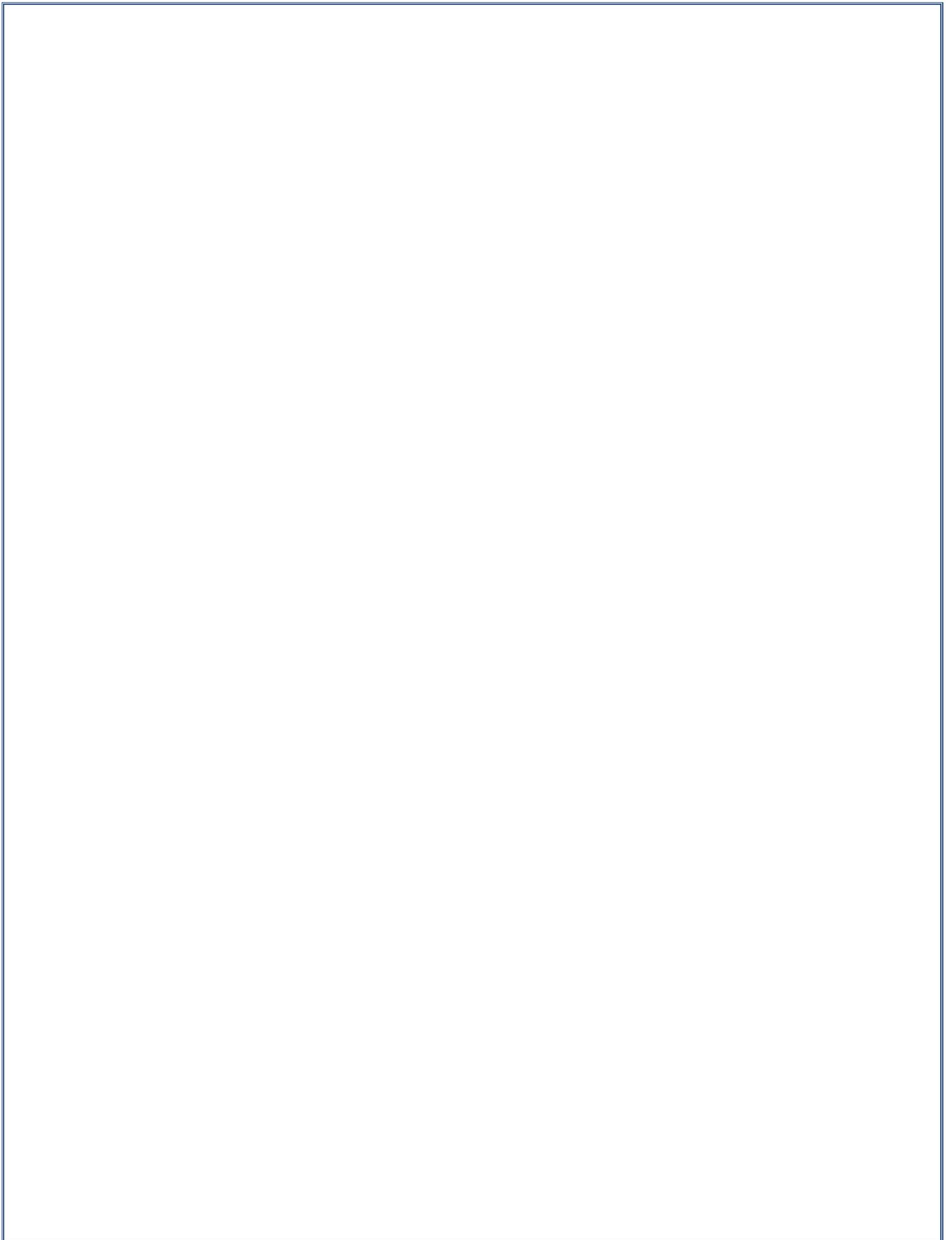
5. (Optional) Choose the case to open

If the correct case is returned in your results, click the View Case Details icon that appears to the right of that case.

Case File Number	Incapacitated Person	Filing Date	Participants	Roles	Details
OC-1011-2018	Dunmoore, Betty	09/06/20		Incapacitated Person	
7777-2018	Dunmoore, Betty	03/01/20		Incapacitated Person	



Working with Reports





How to Review a Report

1. Open the report detail

In the Ready For Review tab on the Dashboard, click the View Report Details icon.

Case File No.	Incapacitated Person	Flags	Accepted By	Accepted Date
OC-1001-2018	Flaxman, Sandy	0	aopc_admin32	09/01/2020 02:07 PM

Report Details

Report Details | Status History | Payment

Case File Number	Incapacitated Person	Report	Guardian(s)	Counsel	Reporting Period	Due Date
1-2020	Flaxman, Sandy	Inventory	Guardian, Robert Trusty Trust Bank	Johnson, Theodore Joseph	8/25/2020 - 11/22/2020	11/23/2020

Document(s)

Document	File
Inventory Report	

Flag Details

Number of Flags
0

Mark as Reviewed:

Comment:

Submit Cancel

3. Select Mark as Reviewed

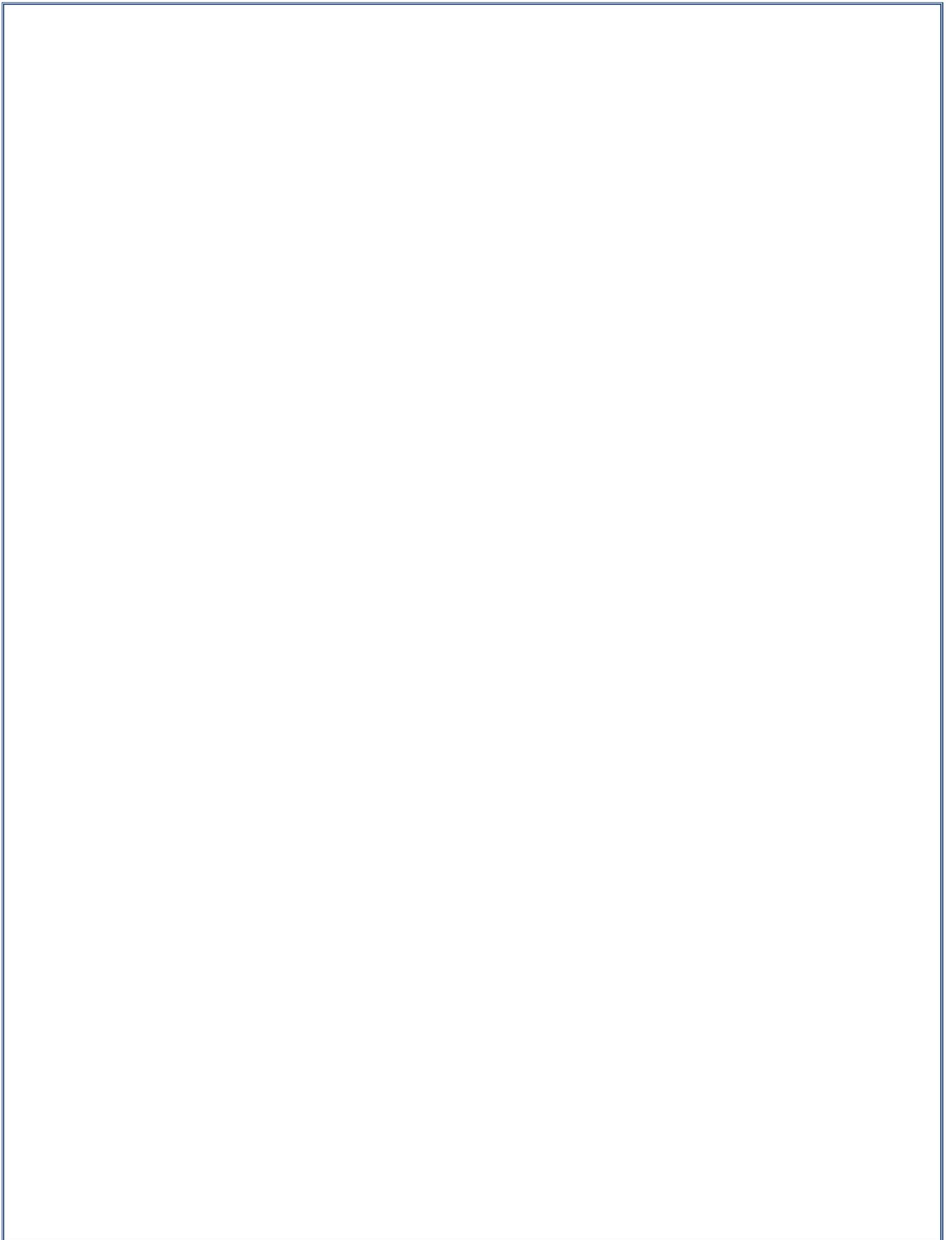
5. Click SUBMIT

2. (Optional) Open the full report

If you haven't done so previously, such as when it was submitted or when resolving any flags, review the full report by clicking the Document icon.

4. (Optional) Record Comments

Tip If you receive a message that says "Flags still exist with a New status", refer to the *Add or Update Flags on a Report* reference guide to resolve the outstanding flags.





How to Add or Update Flags on a Report

1. Do you need to review the report with flags on it?

To review the report as a PDF with the flags displayed, continue to Step 2. Otherwise, to go directly to flag review, proceed to Step 6.

Case File No.	Incapacitated Person	Report	Flags	Accepted By	Date
OC-1001-2021	Hollings, Kathryn	Person	0	aopc_admin32	11:17 PM

2. Access the Report Details popup

On the Ready for Review tab on your Dashboard, click the View Report Details icon.

Case File Number	Incapacitated Person	Report	Guardian(s)	Counsel
OC-1001-2021	Hollings, Kathryn	Annual Report of the Person	Hollings, Gregory	

Document	File
Annual Report of the Person.pdf	

Number of Flags
1

3. Open the report with flags

In the Report Details popup, click the View Report with Flags icon.

6. During this Report Period, was a Protection from Abuse Order entered against any guardian?

Yes - Please describe No

Guardian Name Description

4. Review the flags displayed in the report

The printable version of the report opens in a new tab. Flags are displayed in the margin of the question that caused the concern. Review the information provided by the guardian.

5. Return to the Web Portal

Close the tab displaying the report to return to the Web Portal so you can continue

How to Add or Update Flags on a Report



6. Access the Flag Review screen

Back in the Report Details popup, click on the Flag Review icon.

Tip If you did not review the report with flags on it, the same icon is available in the Ready for Review tab of the Dashboard.

The screenshot shows the 'Report Details' screen with tabs for 'Report Details', 'Status History', and 'Payment'. A table lists report information for case file number OC-1001-2021, including the incapacitated person (Hollings, Katheryn) and the report type (Annual Report of the Person). Below the table, there is a 'Document(s)' section with a file named 'Annual Report of the Person.pdf' and a 'Flag Details' section showing 'Number of Flags' as 1. A blue flag icon with an 'F' is visible in the bottom right corner of the flag details section.

Priority	Flag Rule Name	Description	Concern	Previous report
Low	Questionable Activity - PFA	The guardian was cited with a Protection from Abuse Order or Protection from Sexual Violence Order in the current reporting period.	New	

7. Access the Add/Edit Flag popup

On the Flag Review screen, find the question that generated a concern and click the Edit Flag icon.



How to Add or Update Flags on a Report

8. Update the flag status

Select the **Concern Status** and record **Comments**.

Status	Comment	Create Date	Create User
New	System Generated	3/24/2025 11:24:10 AM	System Generated

Concern Type: Guardian Cited with Protection from / v

* Description: The guardian was cited with a Protection from Abuse Order or Protection from Sexual Violence Order in the current reporting period. (369 characters remaining)

* Concern Status: Resolved v

* Comment: A case action for change of guardian has been filed by Peter Nolan. (433 characters remaining)

Submit

9. Click **SUBMIT**

10. Address additional flags

If there are other flags associated to the questions, repeat Steps 7-9 as needed.

12. Access the Add/Edit Flag popup

Locate the question on the report that raised a concern and click the Add Manual Flag icon.

3. Have you maintained a log of your activities as a guardian?

Priority	Flag Rule Name	Description	Concern Status	Set c
No results found				

Guardian Activity Log: No

11. Do you need to add a manual flag?

If you need to add manual flags to any questions, continue to Step 12. Otherwise, proceed to Step 16.

How to Add or Update Flags on a Report



13. Record the flag details

Tip If a flag was added in error, change the **Concern Status** to 'Resolved' or 'No Concern' and record a **Comment** to indicate it was added in error.

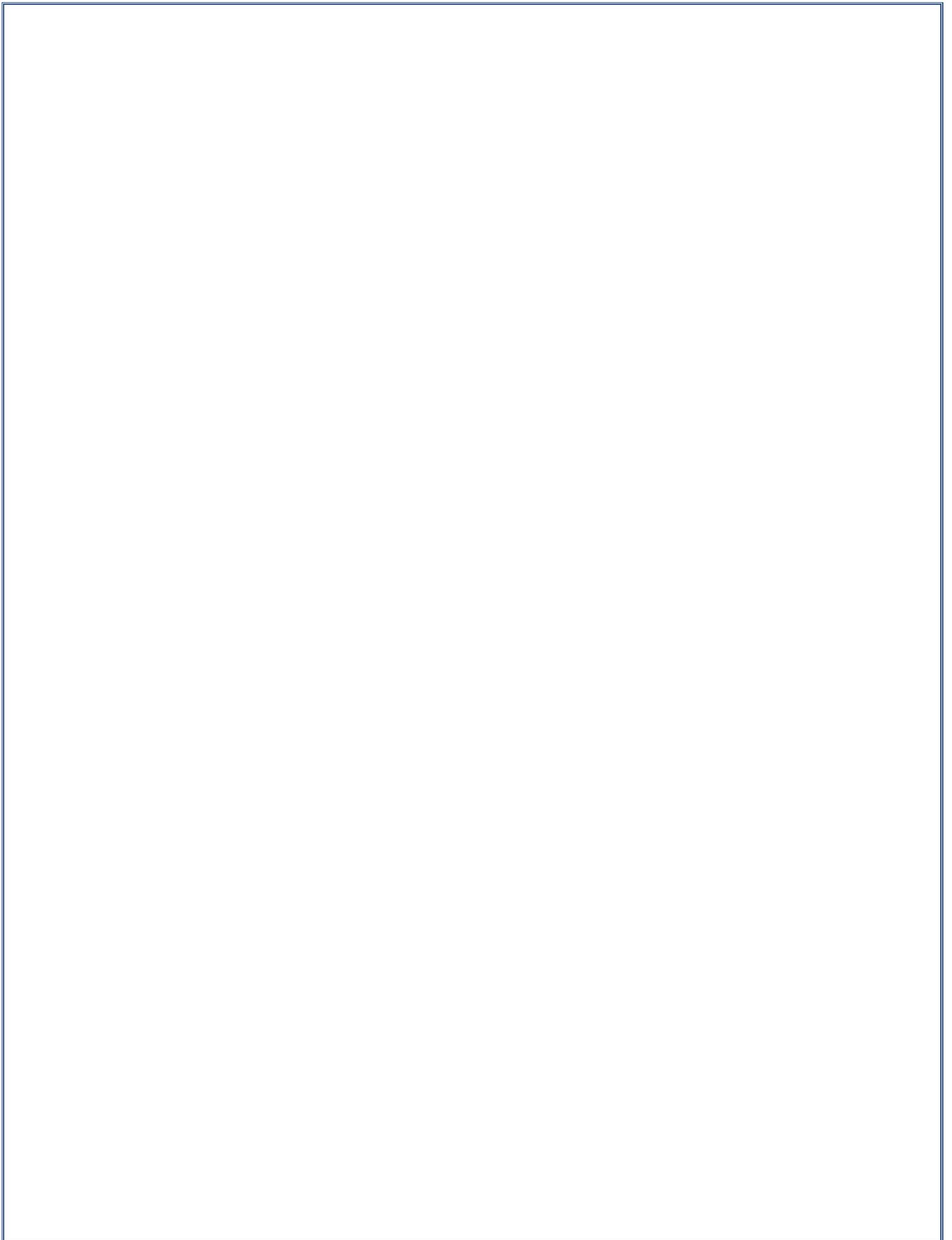
14. Click SUBMIT

15. Add additional manual flags

If other manual flags need to be added, repeat Steps 12-14 as needed.

16. Save and close the report

At the bottom of the Flag Review screen, ensure the **Close** radio button is selected and click OK.



Need Additional Help?

Contact the Help Desk at
1-877-227-2672

or

GTSAOPC@pacourts.us

(Hours of Operation: Monday – Friday 8am – 4:30pm)

AOPC