



GUARDIANSHIP  
TRACKING SYSTEM



Reference Guides

Court  
Edition

<https://ujportal.pacourts.us>

Version 18



## 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.

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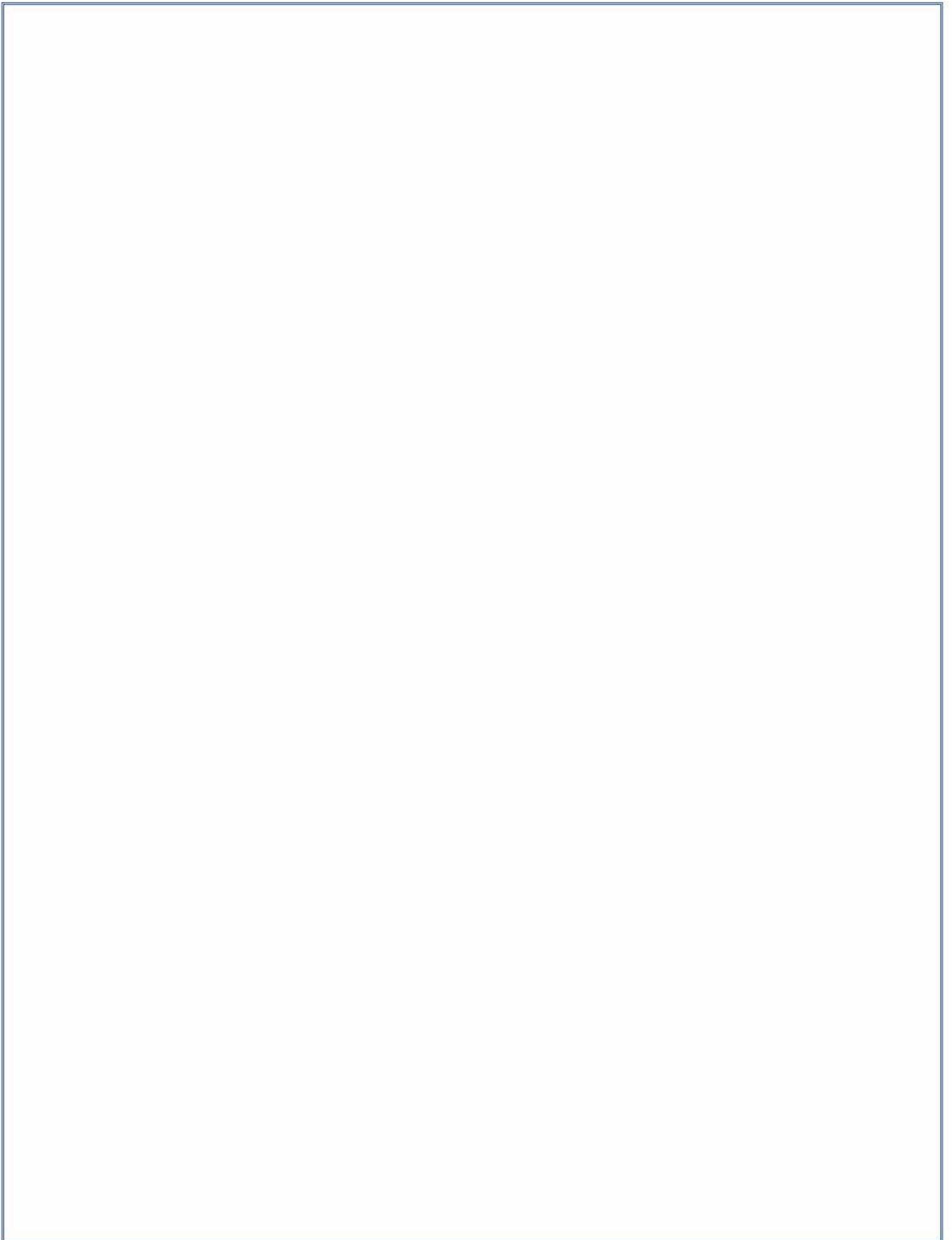
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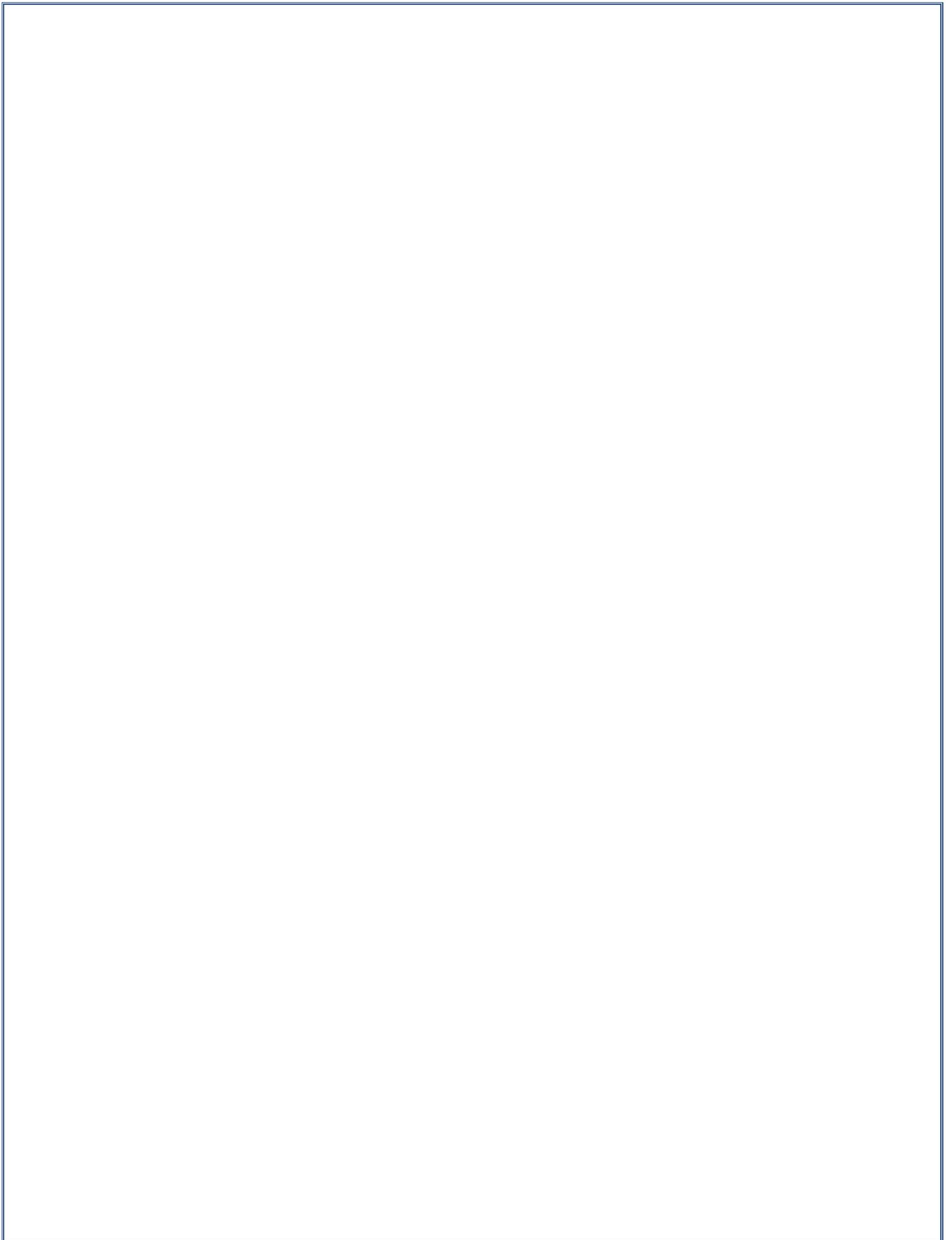
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# Case Creation & Report Entry

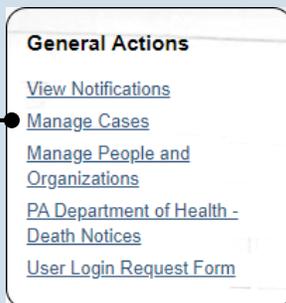




# How to Create a Case

## 1. Open the Guardian Case Search screen

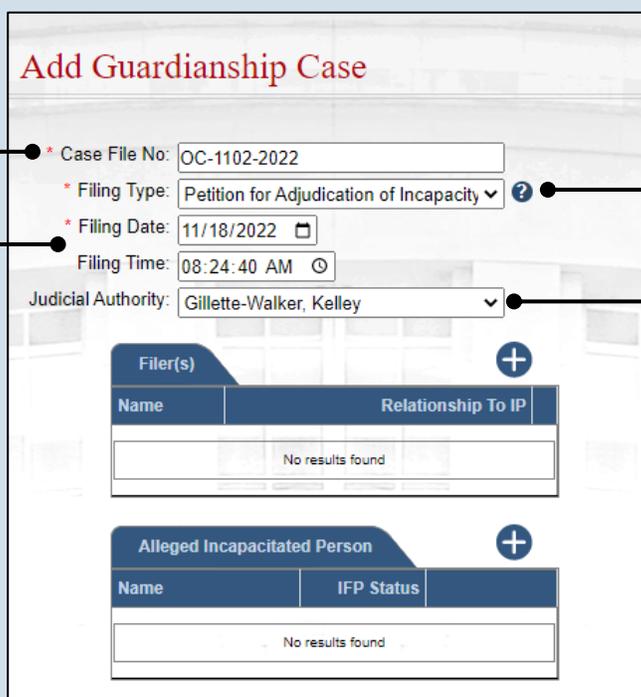
Click on the Manage Cases link appearing in the General Actions section of your Dashboard.



## 2. Click the Create Case icon

## 3. Enter the case number

On the Add Guardianship Case screen, click in the **Case File No** field and enter the unique number assigned to this case through your court's case management system.



## 4. Select a filing type

Click on the **Filing Type** dropdown and select the type of filing that is initiating the new guardianship case.

**Tip** In most cases this will be 'Petition for Adjudication of Incapacity and Appointment of Guardian'.

## 5. Verify/update the filed date

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

## 6. (Optional) Select a judge

Click the **Judicial Authority** dropdown and select the judge that is assigned to the guardianship case.



# How to Create a Case



## 11. Choose an existing participant or create a new one

If the correct petitioner returns in your results, click the radio button that appears to the left of that individual or organization, click **SELECT**, and proceed to Step 15.

Birth Date:

Death Date:

Guardians Only:  (One or more 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"/> Cameron Boggs	Guardian	341 Lincoln Ave. Sandy Ridge, PA 16677 (Home)	Guardian Number: 1200302			1	0

If the search returns no results or the petitioner cannot be identified from your search results, click the Add Participant icon, and continue to Step 12.

## 13. Enter the petitioner's address

Use the **Address Type** field to identify the address as a home, business, or mailing address. You must also enter a street **Address**, **City**, **State**, **County**, and **Zip Code**.

If the petitioner's address is unknown, select the **Address Unknown** checkbox only.

### Add a Person

Add/Edit Case Participant

\* Type: Person

Name Type:

Prefix:

First Name: Cameron

Middle Name:

\* Last Name: Boggs

Generation:

Suffix:

Title:

\* Address Type: Home

Location:  International  United States

\* Address: 341 Lincoln Ave.

\* City: Sandy Ridge

\* State: Pennsylvania

\* Zip Code: 16677

\* County: Centre

Comments:

Address Unknown:

Date of Birth:

SSN:

### 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:

## 12. Verify the petitioner's name information

Verify the **First Name** and **Last Name** fields or the **Organization Name** field is correct.

**Tip:** Any additional name information can be added, if available, that uniquely identifies the petitioner (ex. Name Type, Generation, Suffix, Store/Branch, etc.).

## 14. Click CREATE

# How to Create a Case



## 15. Identify IP relationship

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

Filer(s)	
Name	Relationship To IP
Cameron Boggs	Relative

Alleged Incapacitated Person	
Name	IFP Status
No results found	

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

## 16. Add other petitioners

Repeat Steps 7-15 for any other petitioners that need to be added.

## 17. Begin the process of adding the alleged incapacitated person (IP)

Click the (Add Participant) icon above the Alleged Incapacitated Person grid.

## 19. Enter the alleged IP's name and identifiers

Enter the IP's **Last Name, First Name** and, if available, their **SSN** and **Date of Birth**.

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

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

First Name: Ethel

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

Birth Date: 12/07/1937

Death Date: mm/dd/yyyy

Guardians Only:  (One or more of these fields is required)

Search

## 18. Select a participant type

In the Add/Edit Case Participant popup, verify the **Search By** field defaults to 'Person'.

## 20. Click SEARCH

# How to Create a Case



## 21. Create a new participant or choose an existing record

If the search returns no results or the IP cannot be conclusively identified from the results you receive, click the Add Participant icon, and continue to Step 22.

Name	Type	Address	Identifiers	Date of Birth	Date of Death	Active Cases	Alerts
No results found							

If the correct IP returns in your results, which is only likely with case transfers, click the radio button that appears to the left of their name, click SELECT, and proceed to Step 24.

\* Type: Person  
Name Type:  
Prefix:  
First Name: Ethel  
Middle Name:  
\* Last Name: Witt  
Generation:  
Suffix:  
Title:  
\* Address Type: Home  
Location:  International  United States  
\* Address: 802 Wilson Ave.  
\* City: Sandy Ridge  
\* State: Pennsylvania  
\* Zip Code: 16677  
\* County: Centre  
Comments:  
Address Unknown:   
Date of Birth: 12/07/1937  
SSN:  
Create

## 22. Enter the IP's name and address information

Use Steps 12-13 as a guide to enter the IP's **First Name, Last Name, Address, Date of Birth** and, if available, social security number.

**Tip:** The **Address Type** field contains unique options specific to IPs (ex. Nursing Home Facility, 'Relative's Home', 'Assisted Living Facility', etc.).

## 23. Click CREATE

# How to Create a Case



## 24. (Optional) Enter the IP's IFP status

In the Add Guardianship Case screen, click the **IFP Status** dropdown and specify if a petition has been filed, granted, or denied regarding the IP's IFP (In Forma Pauperis) status.

If this does not apply to the IP, continue to Step 25.

## 26. Add the proposed guardian(s)

If the petitioner is also the requested guardian, click the (Copy Petitioners) icon above the Proposed Guardian(s) grid. If no other guardians need to be added, proceed to Step 35.

If the requested guardian is not the petitioner, or co-guardians need to be added, click the (Add Proposed Guardian) icon and continue to Step 28.

**Add Guardianship Case**

\* Case File No: OC-1102-2022  
\* Filing Type: Petition for Adjudication of Incapacity  
\* Filing Date: 11/18/2022  
Filing Time: 08:24:40 AM  
Judicial Authority: Gillette-Walker, Kelley

Filer(s)	
Name	Relationship To IP
Cameron Boggs	Relative

Alleged Incapacitated Person	
Name	IFP Status
Ethel Witt	

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

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

## 25. Identify the requested guardianship domain

In the Add Guardianship Case screen, select the **Guardianship** checkbox for the Person and/or Estate domain as it applies to the scope of guardianship.

## 27. Identify the relief type(s)

For one or both of the domains selected in Step 25, click the corresponding **Relief Type** dropdown and select the 'Limited' or 'Plenary' option to identify the type of relief being requested, and continue to Step 26.

# How to Create a Case



## 28. 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 petition.

### Search by Person

**Add/Edit Case Participant** [X]

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**

## 29. Enter the requested guardian's name and any available identifiers

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

**Tip:** If known, using the **Guardian Number** is the quickest way to find a guardian record.

## 30. Click SEARCH

### Search by Organization

**Add/Edit Case Participant** [X]

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:

Attorneys Only:

**Search**

## 31. 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 34.

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 32.

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

**Select**

# How to Create a Case



## 32. Enter the requested guardian's information

In the Add Case Participant popup, use Steps 12-14 as a guide to enter the guardian's name, address and, if available, 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

## 34. (Optional) Add other proposed guardians

If there are additional proposed guardians, repeat Steps 26-33 as needed.

## 33. Click CREATE

## 35. Is the guardian an organization?

If the guardian is an organization, and you know the principal and responsible agent, continue to Step 36.

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 42.

# How to Create a Case



## 36. Add the principal(s)

In the Add Guardianship Case screen, click the (Add Principal/Responsible Agent) icon for the corresponding organization.

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

## 37. Select the principal(s)

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 41.

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

Select

## 38. Search for the principal

Use Steps 28-33 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 41.

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 39.

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

If the appropriate principal does not display, then they must be associated to the organization. Click the (Add Personnel) icon and continue to Step 38.

# How to Create a Case



## 39. Create a new principal participant

Use Steps 32-33 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

## 40. (Optional) Add other principal(s)

Use Steps 37-39 as a guide to add additional principals.

## 41. Verify or add the responsible agent(s)

Use Steps 37-40 as a guide to associate the responsible agent(s) to the case.

**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	[ ]
<input checked="" type="checkbox"/>	Sheridan, Phillip	Guardian Number: 308	Responsible Agent	[ ]

Select

# How to Create a Case



## 42. Identify domains for proposed guardian(s)

In the Add Guardianship Case screen, click the **Person Domain** and/or **Estate Domain** checkboxes, as they apply, for the proposed guardian(s).

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

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

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

Ok

## 43. (Optional) Begin the process of uploading the petition

Click the CHOOSE FILE button.

**Tip** If you are not uploading an electronic version of the petition to GTS, proceed to Step 45.

## 44. Upload the electronic version of the petition

In the popup screen that appears, locate the electronic version of the petition 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

Open

This PC

Search New folder

Organize New folder

Name	Date modified	Type	Size
Petition for Adjudication of Incapacity	5/10/2018 11:12 ...	Adobe Acrobat D...	

File name: Petition for Adjudication of Incapacity

All Files (\*.\*)

Open Cancel

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

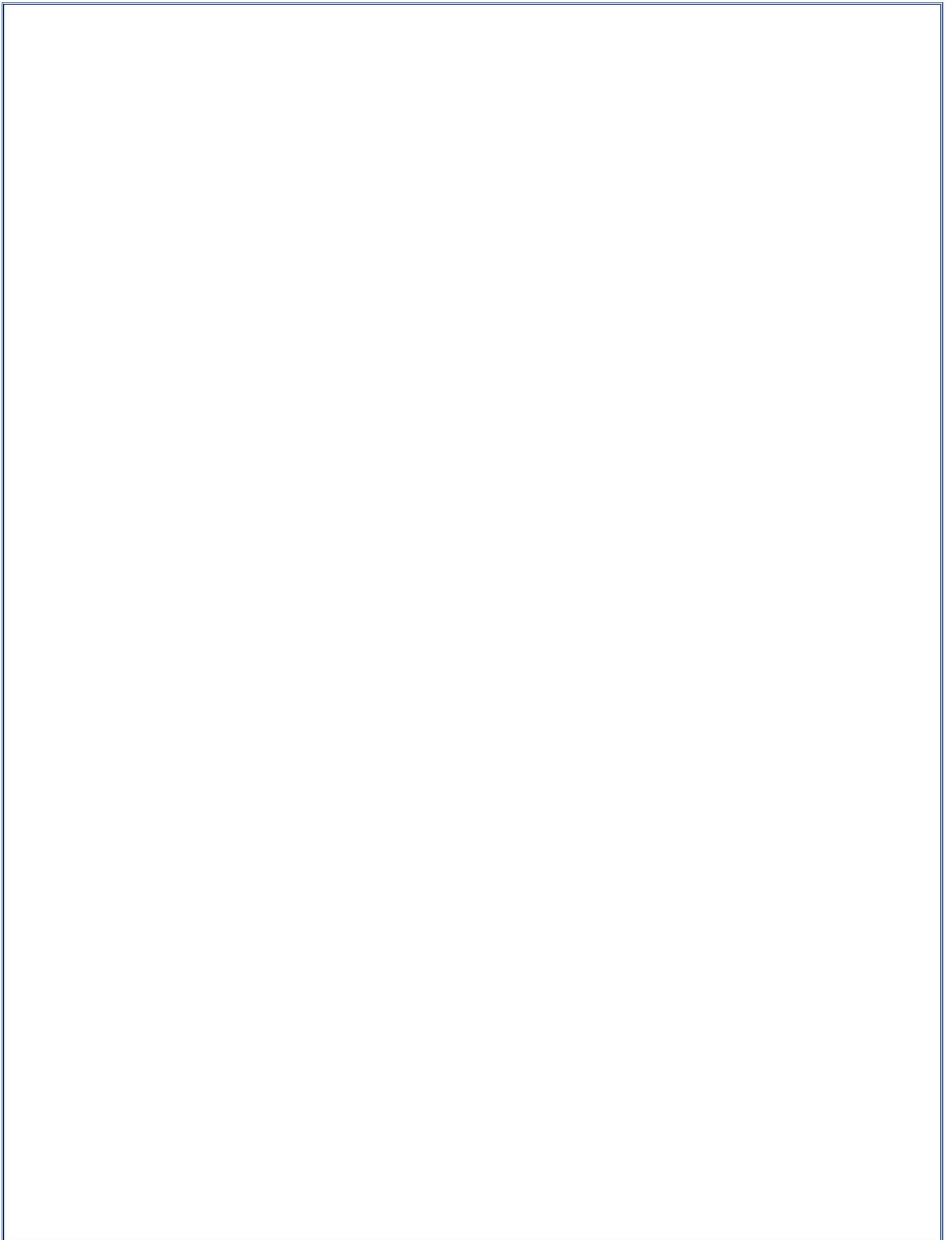
  

Document(s)	
Document	File
	<input type="button" value="Choose File"/> No file chosen

Ok

## 45. Save your changes and create the case

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





# How to Enter a Paper-Filed Inventory Report

## 1. Search for the case

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:

[Advanced Search](#)

- [Incapacitated Person](#)
- [Case Actions](#)
- [Guardians](#)
- [Other Case Participants](#)
- [Attorneys](#)
- [Reports](#)
- [Bond Ordered](#)
- [Suppressed Flags](#)
- [Report Reminders](#)

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

## 3. Open the report

Click the Create Report icon next to the Inventory report.

Report	Due Date	Status
Inventory	12/30/2022	Eligible for Submission
Person	10/01/2023	Eligible for Submission

**Tip** If there are multiple guardians associated to the Person domain, you will click the Guardian Selection icon  instead.

**Guardian Selection**

Guardian	
Boggs, Cameron	<input type="button" value="+"/>
Zimmerman, Joseph K	<input type="button" value="+"/>

## 4. Specify the submitter

If the case has more than one guardian, the Guardian Selection popup appears. Click the Create Report icon next to the name of the guardian that submitted the report. Continue to Step 5.

## 5. Part I:

### Introduction

On the GTS - Inventory Report screen, confirm that the **Inventory Type** defaults to 'Initial.'

**Inventory Report**

Estate of Fowler, Denise, an Incapacitated Person  
 Date of Birth: 9/9/1942  
 Case File No. OC-1105-2022  
 DATE COURT APPOINTED YOU AS GUARDIAN: 10/1/2022

---

**PART I. INTRODUCTION**

\* Inventory Type:

If the popup does not appear, continue to Step 5.

# How to Enter a Paper-Filed Inventory Report



## 6. Part II, #1:

### Assets?

If the IP has assets (i.e. bank accounts, real estate, or other personal property), and you want to itemize this information, click on the dropdown and select 'Yes'. Proceed to Step 8.

Otherwise, select 'No' from the dropdown and continue to Step 7.

PART II. ASSETS (PRINCIPAL)

1. List all bank accounts, real estate and other personal property below. If the property is owned space below.

\* Do you wish to enter asset details for the incapacitated person: No

\* Please enter the total asset amount: 1801

## 7. Part II, #1

### (cont.): Total asset amount

Click in the field and enter the total value of all the IP's assets. Proceed to Step 14.

## 8. Part II, #1

### (cont.): Click the Add Asset icon

PART II. ASSETS (PRINCIPAL)

1. List all bank accounts, real estate and other personal property below. If the property is owned space below.

\* Do you wish to enter asset details for the incapacitated person: Yes

Asset Type	Asset Description	Name of Co-Owner(s)	Asset Value	
Cash and Cash Eq	Checking Account		1036	
Personal Property	Clothing		765	

SubTotal: 1801

## 9. Part II, #1

### (cont.): Asset Type

Click on the **Asset Type** dropdown and select the option that best describes the type of property you are recording for the IP.

## 10. Part II, #1:

### (cont.): Description

Click in the **Asset Description** field and enter a summary of the asset as provided by the guardian.

## 11. Part II, #1:

### (cont.): Name of co-owners

Click in the **Name of Co-Owner(s)** field and enter the name of any individual, other than the IP, that maintains ownership in the asset. This may not be applicable in all instances.

## 12. Part II, #1:

### (cont.): Value

Click in the **Asset Value** field and enter the amount, in U.S. dollars, the asset is worth.

## 13. Part II, #1

### (cont.): Add other assets

Repeat Steps 8-12 for all the IP's assets.

# How to Enter a Paper-Filed Inventory Report



## 14. Part II, #2: Co-ownership

Click on the dropdown and select 'Yes' or 'No' to specify if any property, especially bank accounts or real estate, are co-owned by the IP and the guardian.

If you selected 'No', proceed to Step 18.

If you selected 'Yes', continue to Step 15.

**Tip** If the IP has no assets, answer 'No'.

2. Is any property (specifically bank accounts or real estate) co-owned by the Incapacitated Person and the guardian?

\* Joint Property: Yes

a. On what date was the property acquired: 05/20/2017

b. On what date was the guardian's name added: 06/20/2022

c. The guardian is:  an individual having access or control over the account  an owner of the account

## 15. Part II, #2a: Date acquired

Enter the date on which the property was originally acquired by the IP.

## 16. Part II, #2b: Date guardian added

Enter the date on which the guardian's name was added as a co-owner to the property. This may or may not be the same as the original date of acquisition.

## 17. Part II, #2c: Guardian ownership

Select the appropriate checkbox based on whether the guardian has control over the account and/or is an owner.

# How to Enter a Paper-Filed Inventory Report



## 18. Part II, #3: *Homeowners insurance*

Click on the dropdown and select 'Yes' or 'No' to specify if the IP has homeowners insurance for any real property they own.

If you selected 'Yes', continue to Step 19.

If you selected 'No', proceed to Step 21.

3. Does the Incapacitated Person have a homeowners insurance policy for real property?

\* Homeowner's Insurance: Yes

a. Homeowner's Insurance Carrier: Nationwide Insurance

b. Homeowner's Insurance Coverage Start: 01/20/2022

Homeowner's Insurance Coverage End: 01/20/2023

Copy of policy to be provided upon request.

## 19. Part II, #3a *(cont.): Carrier*

Click in the **Homeowner's Insurance Carrier** field and enter the name of the insurance provider that sold the homeowners policy.

## 20. Part II, #3b *(cont.): Coverage Period*

Click in the **Homeowner's Insurance Coverage Start** and **End** fields and enter dates for which the coverage is valid.

4. Does the Incapacitated Person have an automobile insurance policy?

\* Automobile Insurance: Yes

a. Automobile Insurance Carrier: Nationwide Insurance

b. Automobile Insurance Coverage Start: 10/19/2022

Automobile Insurance Coverage End: 04/19/2023

Copy of policy to be provided upon request.

## 21. Part II, #4: *Automobile insurance*

Click on the dropdown and select 'Yes' or 'No' to specify if the IP has an automobile insurance policy.

If you selected 'Yes', continue to Step 22.

If you selected 'No', proceed to Step 24.

## 22. Part II, #4 *(cont.): Carrier*

Click in the **Automobile Insurance Carrier** field and enter the name of the insurance provider that sold the policy.

## 23. Part II, #4 *(cont.): Coverage Period*

Click in the **Automobile Insurance Coverage Start** and **End** fields and enter dates for which the coverage is valid.

# How to Enter a Paper-Filed Inventory Report



## 24. Part II, #5: Safe deposit box

Click on the dropdown and select 'Yes' or 'No' to specify if the IP has a safe deposit box.

If you selected 'No', proceed to Step 28.

If you selected 'Yes, in sole name', proceed to Step 26.

If you selected 'Yes, in joint names', continue to Step 25.

## 26. Part II, #5a: Safe deposit box location

Enter the name and address of the bank or other institution where the safe deposit box is housed.

5. Does the Incapacitated Person have a safe deposit box?

\* Safe Deposit Box: Yes, in joint name(s) ▼

\* Joint name(s): Cameron Boggs

\* a. Location of safe deposit box: Members 1st, 105 Chambersburg St. Se

\* b. Are there plans to inventory the contents?: Yes ▼

## 25. Part II, #5 (cont.): Joint names

Click in the **Joint name(s)** field and enter the name of any individual, other than the IP, that maintains joint ownership of the box.

## 27. Part II, #5b: Inventory safe deposit box

Click on the dropdown and select 'Yes' or 'No' to specify if the safe deposit box will be, or already has been, inventoried.

# How to Enter a Paper-Filed Inventory Report



## 28. Part III, #1: Did the IP receive income?

If the IP received income during the reporting period and you want to itemize the individual sources, click on the dropdown and select 'Yes'. Proceed to Step 30.

Otherwise, select 'No' from the dropdown and continue to Step 29.

PART III: ANNUAL INCOME

1. List all sources of income for the Incapacitated Person:

\* Do you wish to enter income details for the incapacitated person?: No

\* Please enter the total income amount: 9810

## 29. Part III, #1 (cont.): Total income amount

Click in the field and enter the IP's total income for the reporting year. Proceed to Step 34.

## 30. Part III, #1 (cont.): Click the Add Income Source icon

PART III: ANNUAL INCOME

1. List all sources of income for the Incapacitated Person:

\* Do you wish to enter income details for the incapacitated person?: Yes

Does the Incapacitated Person receive any of the following as income?

Income Source Type	Income Description	Income Amount	
Social Security Benefits (Retirement, I		9810	
			SubTotal:
			9810

## 31. Part III, #1 (cont.): Income Source Type

Click on the **Income Source Type** dropdown and select the option that best describes the income the IP receives.

## 32. Part III, #1 (cont.): Income amount

Click in the **Income Amount** field and enter the annual income, in U.S. dollars, for the selected income source type.

**Tip** If you choose 'Other', you must enter a description of the income.

## 33. Part III, #1 (cont.): Add other income

Repeat Steps 30-32 for any additional sources of income for the IP.

# How to Enter a Paper-Filed Inventory Report



## 34. Part IV, #1:

### *Liability/debt?*

If the IP has any outstanding liabilities or debts and you want to itemize this information, click on the dropdown and select 'Yes'. Proceed to Step 36.

Otherwise, select 'No' from the dropdown and continue to Step 35.

PART IV. LIABILITIES/DEBTS

1. List all debts the Incapacitated Person owes, including mortgages, loans, credit card debt, etc.

\* Do you wish to enter liabilities and debt details for the incapacitated person: No

\* Please enter the total liabilities and debt amount: 473

## 35. Part IV, #1

### *(cont.): Total liabilities/debt amount*

Click in the field and enter the IP's total liabilities and debts for the reporting year. Proceed to Step 41.

## 36. Part IV, #1

### *(cont.): Click the Add Income Source icon*

## 38. Part IV, #1

### *(cont.): Lender*

Click in the **Lender** field and enter the name of the person or organization to whom the IP owes a debt.

PART IV. LIABILITIES/DEBTS

1. List all debts the Incapacitated Person owes, including mortgages, loans, credit card debt, etc.

\* Do you wish to enter liabilities and debt details for the incapacitated person: Yes

Liability/Debt	Lender	Value	
Credit Card	Visa	473	
SubTotal:		473	

## 37. Part IV, #1

### *(cont.): Type of liability/debt*

Click in the **Liability/Debt** field and summarize the type of debt that is owed by the IP (ex. mortgage, credit cards, automobile loan, etc.).

## 40. Part IV, #1

### *(cont.): Add other liabilities/debts*

Repeat Steps 36-39 to enter any additional liabilities/debts owed by the IP.

## 39. Part IV, #1

### *(cont.): Value*

Click in the **Value** field and enter the amount, in U.S. dollars, that is owed to the lender.

# How to Enter a Paper-Filed Inventory Report



## 41. Part V, #1:

### *Surety bond*

Confirm that the information appearing in this field correctly shows if a surety bond was required by the decree that appointed the guardian.

**PART V: GUARDIAN COVERAGE**

1. Was a surety bond required by the decree appointing you as guardian?  
\* Surety Bond Required: Yes

Please attach a copy of the bond using the (Upload Document) button found at the bottom of the page.

2. Are you a professional guardianship agency or an attorney serving as a guardian?  
\* Professional Status: Yes

\* Do you have professional liability coverage?: Yes

Please attach a copy of insurance policy using the (Upload Document) button found at the bottom of the page.

## 43. Part V, #2:

### *(cont.): Liability coverage*

Click on the dropdown and select 'Yes' or 'No' to specify if the guardian maintains personal liability coverage.

**Tip** If you select 'Yes', you have the option to upload a copy of the guardian's insurance policy, if it was provided, to this report. This can be completed in Step 72.

## 42. Part V, #2:

### *Professional guardian?*

Click on the dropdown and select the appropriate option to specify if the guardian works for a professional guardianship agency or is an attorney.

If you selected 'Yes', continue to Step 43.

If you selected 'No', 'Not Answered', or 'Needs Review', proceed to Step 44.

# How to Enter a Paper-Filed Inventory Report



## 44. Part VI, #1: IP's residence

Click on the dropdown and select 'Yes' or 'No' to specify if the IP lives at home or in the home of a relative.

If you selected 'Yes', continue to Step 45.

If you selected 'No' or 'N/A – The Incapacitated Person is already in a supervised residential setting', proceed to Step 47.

## 45. Part VI, #1 (cont.): Name of relative

Enter the name(s) of the family member(s) that is providing in-home assistance to the IP.

## 46. Part VI, #1 (cont.): Support services

Select any of the checkboxes that apply.

- If you selected **Private Companion/Assistance Service**, you must also enter the number of days and hours per week.

- If you selected **Assistance from family members**, you must click on the dropdown and specify if the relative receives compensation. If yes, enter the amount in U.S. dollars.

# How to Enter a Paper-Filed Inventory Report



## 47. Part VI, #2: Supervised residential setting

Click on the dropdown and select 'Yes' or 'No' to specify if there are plans to move the IP to a supervised residential setting (ex. nursing home, assisted living, personal care, etc.).

If you selected 'Yes', continue to Step 48.

If you selected 'No', 'N/A – The Incapacitated Person is already in a supervised residential setting', proceed to Step 51.

## 49. Part VI, #2b: Explanation

Enter any steps, whether completed or not, that the guardian is taking to move the IP to the residential setting.

## 51. Part VII, #1b: Annual expenses

Enter the estimated annual expenses paid, in U.S. dollars, for the care of the IP.

**Tip** Each of the other fields in this question will display information automatically based on the details you have already entered.

2. Will the Incapacitated Person be moved into a supervised residential setting?

\* Impending Relocation to supervised residential setting?: Yes

\* a. Supervised Residential Setting Type: Boarding Home / Group Home

\* b. Supervised Residential Setting Steps: Will choose between two group homes after speaking with the Residential Supervisor and staff at Lilac Acres and ...

3. Incapacitated Person's Current Residence

\* Address Type: [dropdown]

\* Address Line 1: 111 Elm St.

Address Line 2: [text box]

\* City: Sandy Ridge

\* State: Pennsylvania

\* Zip Code: 16677

## 48. Part VI, #2a: Type of residential setting

Click on the dropdown and choose the option that best describes the residential setting.

**Tip** If you choose 'Other' you must describe the residential setting.

## 50. Part VI, #3: IP's Residence

Enter the IP's current address.

PART VII: FINANCIAL PLAN

1. Complete the following table using initial inventory or most recent amended inventory

a. Total Annual Income:	9810	Note: This is a computed field, Part III
* b. Annual Estimated Expenses:	10043	
c. Net Income:	-233	Note: This is a computed field, a minu
d. Total assets (principal):	1801	Note: This is a computed field, Part II

# How to Enter a Paper-Filed Inventory Report



## 52. Part VII, #2: *Income vs. expenses*

Based on whether the Net Income, from Question #1c, is a positive or negative amount, click on the dropdown and select the best option that specifies whether the IP's income can meet their expenses.

## 54. Part VII, #3 (cont.): *Application Type*

Click on the **Application Type** dropdown and select the best option.

## 56. Part VII, #3 (cont.): *Add other applications*

Repeat steps 53-55, as needed, for any additional applications that need to be entered.

## 53. Part VII, #3: *Government benefits*

If an application(s) has been submitted on behalf of the IP for government benefits, click the Add Government Benefit icon. Continue to Step 54.

If no applications have been submitted, proceed to Step 57.

## 55. Part VII, #3 (cont.): *Date of submission*

Click in the **Date of submission** field and enter the date the application was submitted to the appropriate agency.

## 57. Part VII, #4: Real estate

Based on the details provided by the guardian, summarize how any real estate owned by the IP will be sold and/or maintained during the guardianship.

2. Is the net income listed above sufficient to care for the needs of the Incapacitated Person?  
\* Sufficient Income: No, but assets (principal) are availab

3. Indicate any applications for government benefits that have been submitted:

Application Type	Description	Date of submission	
Social Security Disability Insurance (SSDI)		01/20/2022	+

4. Describe all real estate included in the estate and how it will be maintained or sold  
Real Estate Description: IP has a residence at 1301 Maple Avenue in Sandy Ridge, PA 16677 and guardian Cameron Boggs is in charge of maintenance of this residence along

# How to Enter a Paper-Filed Inventory Report



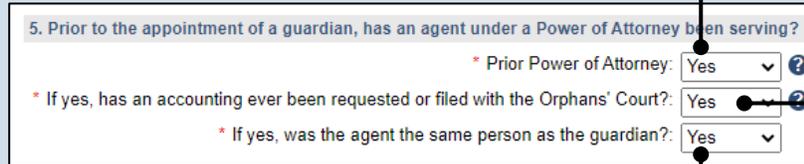
## 58. Part VII, #5:

### *Power of attorney*

Click on the dropdown and select 'Yes' or 'No' to specify if the IP had designated a power of attorney prior to the start of the guardianship.

If you selected 'Yes', continue to Step 59.

If you selected 'No', 'Needs Review', or 'Not Answered', proceed to Step 61.



5. Prior to the appointment of a guardian, has an agent under a Power of Attorney been serving? ?

\* Prior Power of Attorney: Yes  No  ?

\* If yes, has an accounting ever been requested or filed with the Orphans' Court?: Yes  No  ?

\* If yes, was the agent the same person as the guardian?: Yes  No  ?

## 59. Part VII, #5 (cont.):

### *Accounting*

Click on the dropdown and specify if an accounting has been requested by and/or submitted to the court.

## 60. Part VII, #5

### *(cont.): Power of attorney & guardian*

Click on the dropdown and specify if the person that was serving as the power of the attorney is also the guardian for IP.

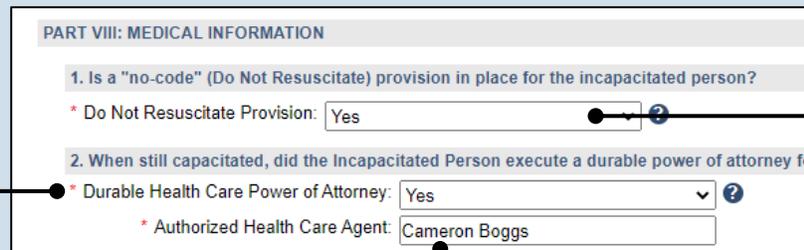
## 62. Part VIII, #2:

### *Durable power of attorney*

Click on the dropdown and specify if a durable power of attorney or other health care directives were arranged by the IP prior to their incapacitation.

If you selected 'Yes', continue to Step 63.

If you selected 'No', 'Not Answered', or 'Needs Review', proceed to Step 64.



PART VIII: MEDICAL INFORMATION

1. Is a "no-code" (Do Not Resuscitate) provision in place for the incapacitated person?

\* Do Not Resuscitate Provision: Yes  No  ?

2. When still capacitated, did the Incapacitated Person execute a durable power of attorney for health care?

\* Durable Health Care Power of Attorney: Yes  No  ?

\* Authorized Health Care Agent: Cameron Boggs

## 61. Part VIII, #1: Do not resuscitate (DNR)

Click on the dropdown and specify if a DNR order exists for the IP.

## 63. Part VIII, #2 (cont.): Identify agent

Enter the name of the individual or organization that has been designated to make the IP's health care decisions.

# How to Enter a Paper-Filed Inventory Report



## 64. Part VIII, #3:

### *Funeral & burial*

Click on the dropdown and specify if the IP has a will, trust, or explicit funeral and burial wishes.

If you selected 'Yes', continue to Step 65.

If you selected 'No', 'Not Answered', or 'Needs Review', proceed to Step 68.

## 65. Part VIII, #3 (cont.):

### *Explanation*

Enter the information that has been provided about the IP's will, trust, and/or their funeral and burial wishes.

## 66. Part VIII, #3

### *(cont.): Burial account*

Click on the dropdown and specify if money has been set aside for burial, in a bank account or some other holding, or prepaid burial arrangements have been made.

If you selected 'Yes', continue to Step 67.

If you selected 'No', proceed to Step 68.

## 67. Part VIII, #3 (cont.):

### *Value of burial account*

Click in the field and enter the value of the burial account in U.S. dollars.

## 68. Co-guardians?

If there is more than one guardian named on this report under Part I, Question #1, continue to Step 69.

Otherwise, proceed to Step 70.

## 69. Co-guardians

Select the **Yes** or **No** radio button to state whether the signature of the co-guardian(s) appears on the paper report.

# How to Enter a Paper-Filed Inventory Report



## 70. Signature and Affirmation

**(cont.): Contact information**

Review the guardian's address. If it is incorrect, save and exit the report, and then update the guardian's participant record.

**Tip:** The **Signature of Guardian** field represents the handwritten signature provided by the guardian on the paper copy.

**Tip:** If any of the co-guardian's information is incorrect, save and exit the report, and then update their participant record through the GTS Case screen.

Date	Signature of Guardian ?	Name of Guardian	Location	Address Line 1 ?	Address Line 2	Address Line 3	City	State	Zip Code	Territory	Postal Code	Country	Home Phone ?	Offi
11/23/2022	/s/ Cameron Boggs	Cameron Boggs	Unit	341 Lincoln Ave.			Sal	I	16677			Unit	( ) - - -	
11/23/2022	/s/ George Sheridan	George Sheridan	Unit	5457 Henley Way			Ge	I	17325			Unit	(717) 555-8888	

Please include any comments you would like to make for this report:

## 71. (Optional) Signature and Affirmation (cont.): Comments

If the guardian provided any additional information about the guardianship that was not recorded elsewhere, enter them in the comments field.

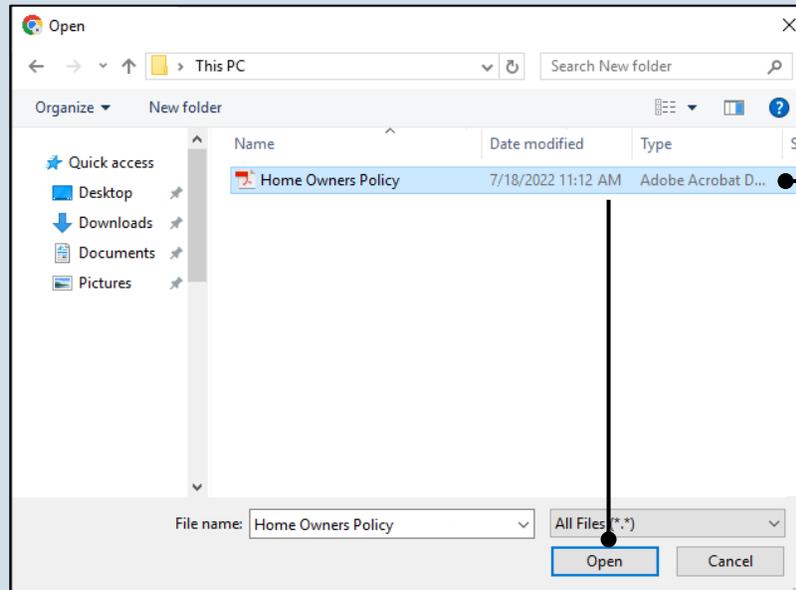
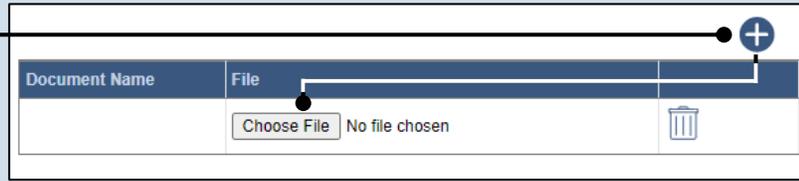
# How to Enter a Paper-Filed Inventory Report



## 72. (Optional) Signature and Affirmation (cont.): Documents

If the guardian provided supplemental documents that you want to upload to the report, click the Upload Document icon, then the CHOOSE FILE button, and continue to Step 73.

If you have no documents to upload, proceed to Step 74.

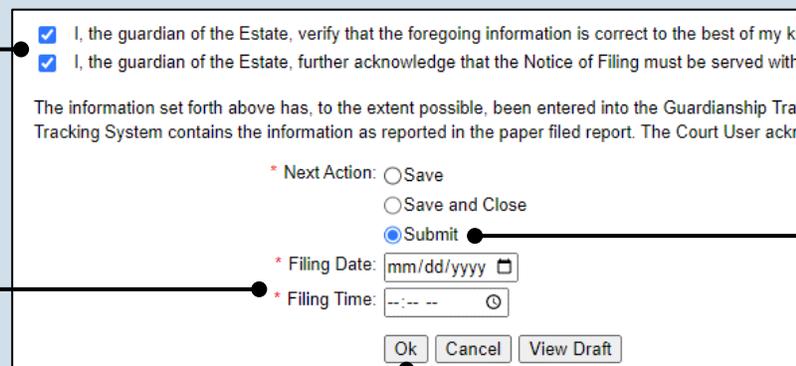


## 73. Signature and Affirmation (cont.): Documents

In the popup screen that appears, locate the PDF version of the document you have saved on your computer or a movable storage device. Select the file and click OPEN.

**Tip:** GTS only accepts documents in a PDF format.

## 74. Select the guardian verification checkboxes

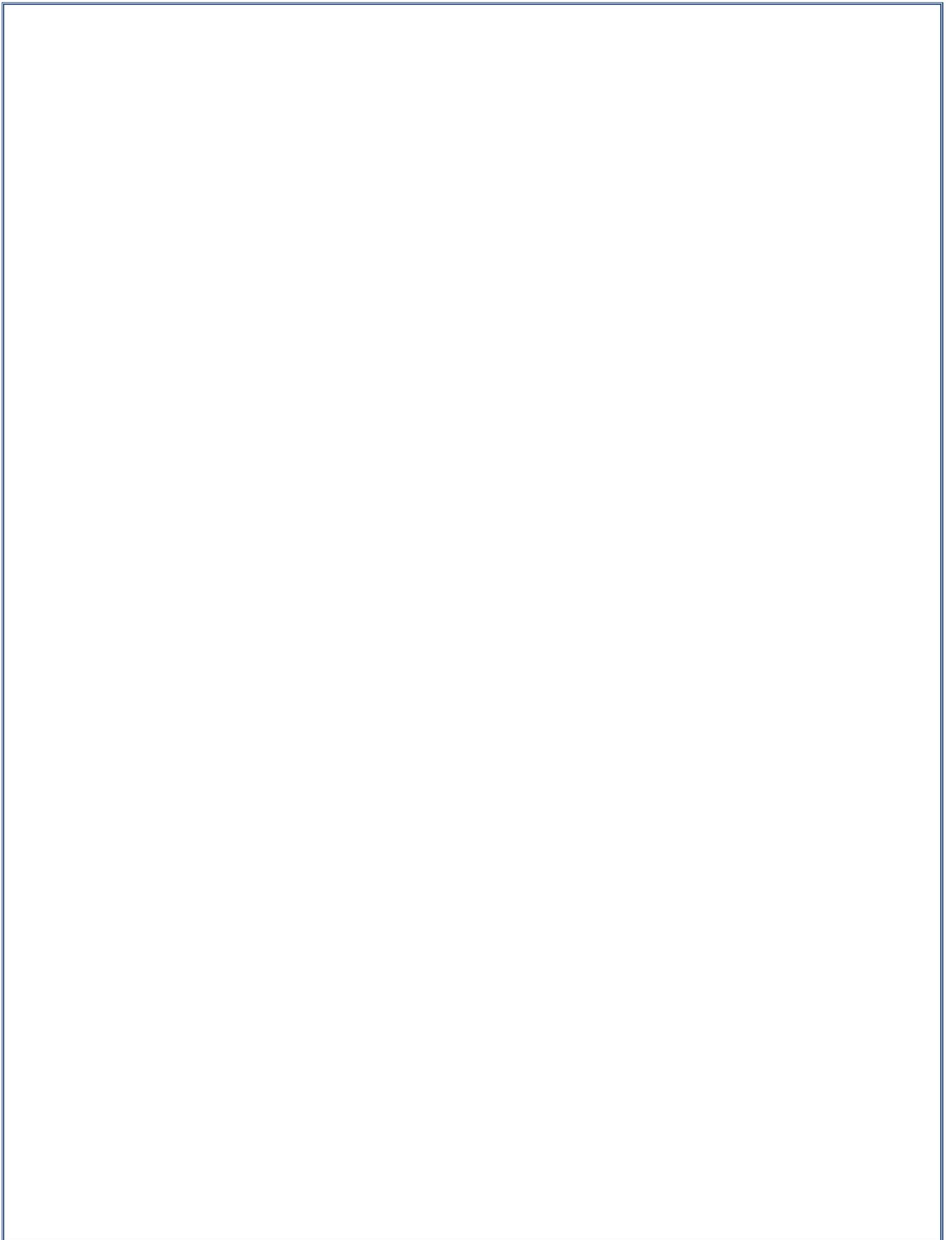


## 76. Enter the filed date/time

Use the **Filing Date** and **Filing Time** fields to specify when the paper report was filed in the court.

## 75. Select the Submit radio button

77. Click OK





# How to Enter a Paper-Filed Guardian of the Estate Report

## 1. Search for the case

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:

[Advanced Search](#)

- [Incapacitated Person](#)
- [Case Actions](#)
- [Guardians](#)
- [Other Case Participants](#)
- [Attorneys](#)
- [Reports](#)**
- [Bond Ordered](#)
- [Suppressed Flags](#)

2. In the GTS Case screen, click the **Reports** tab

## 3. Open the report

Click the Create Report icon next to the Estate report.

Report	Due Date	Status	Flags
Estate	12/01/2022	Eligible for Submission	<input type="button" value="+"/>
Inventory	03/01/2022	Accepted	<input type="button" value="+"/>
Person	12/01/2022	Eligible for Submission	<input type="button" value="+"/>

**Tip** If there are multiple guardians associated to the Estate domain, you will click the Guardian Selection icon  instead.

## 4. Specify the submitter

If the case has more than one guardian, the Guardian Selection popup appears. Click the Create Report icon next to the name of the guardian that submitted the report. Continue to Step 5.

**Guardian Selection**

Guardian	
Boggs, Cameron	<input type="button" value="+"/>
Zimmerman, Joseph K	<input type="button" value="+"/>

If the popup does not appear, continue to Step 5.

## 5. Part I, #1 & #2

On the Report of the Guardian of the Estate screen, confirm that the information appearing under each of these questions is accurate.

**Tip** If this information is incorrect, the existing adjudicatory case action must be removed and replaced with a new one that contains the updated information.

**PART I. INTRODUCTION**

1. Guardian Name(s)  
Guardian Name(s): Joseph Zimmerman

2. Is this a limited Guardianship?  
\* Limited Guardianship:

3. Report Period  
\* Report Type:

\* Report Period Start Date:

\* Report Period End Date:

## 6. Part I, #3: Report Type

Click on the **Report Type** dropdown and select the appropriate option.

# How to Enter a Paper-Filed Guardian of the Estate Report



## 7. Part II, Did the IP receive income?

If the IP received income during the reporting period and you want to itemize the individual sources, proceed to Step 9.

Otherwise, select 'No' from the dropdown and continue to Step 8.

PART II: INCOME

1. List all sources of income received during the Report Period

Did the Incapacitated Person receive any of the following?

\* Do you wish to enter income details for the incapacitated person: No

\* Please enter the total income amount: 9810

## 8. Part II, #1 (cont.): Total income amount

Click in the field and enter the IP's total income for the reporting year. Proceed to Step 13.

## 9. Part II, #1 (cont.): Click the Add Income Source icon

PART II: INCOME

1. List all sources of income received during the Report Period

Did the Incapacitated Person receive any of the following?

\* Do you wish to enter income details for the incapacitated person: Yes

Income Source Type	Income Description	Income Amount	
Social Security Benefits (Retire)		9810	
SubTotal:		9810	

## 10. Part II, #1: Income source type

Click on the **Income Source Type** dropdown and select the option that best describes the income that the IP receives.

**Tip** If you choose 'Other', you must enter a description of the income.

## 11. Part II, #1 (cont.): Income amount

Click in the **Income Amount** field and enter the annual income, in U.S. dollars, for the selected income source type.

## 12. Part II, #1 (cont.): Add other income

Repeat Steps 9-11 for any additional sources of income for the IP.

# How to Enter a Paper-Filed Guardian of the Estate Report



## 13. Part III: Did the IP have expenses?

If the IP had expenses during the reporting period that were paid from their income or estate, and you want to itemize these costs, click on the dropdown and select 'Yes'. Proceed to Step 15.

Otherwise, select 'No' from the dropdown and continue to Step 14.

## 14. Part III, #1 (cont.): Total expense amount

Click in the field and enter the IP's total expenses for the reporting year. Proceed to Step 20.

## 15. Part III, #1 (cont.): Click the Add Expense icon

Expense	Payee	Expense Description	Expense Amount
Personal Expenses (including)	Weekly Spending		5200
Medical Insurance Premiums	Delta Dental		400
Medical Expenses	Dr. Miranda Lovell		1400
SubTotal:			7000

## 16. Part III, #1 (cont.): Expense Source Type

Click on the **Expense** dropdown and select the option that best describes the expense that you are attempting to enter.

## 17. Part III, #1 (cont.): Payee

Click in the **Payee** field and enter the person or organization to whom the money was paid.

## 18. Part III, #1 (cont.): Expense amount

Click in the **Expense Amount** field and enter the total amount, in U.S. dollars, of the expense.

## 19. Part III, #1 (cont.): Add other expenses

Repeat Steps 15-18 for any additional expenses paid for from the IP's income or estate.

# How to Enter a Paper-Filed Guardian of the Estate Report



## 20. Part III, #2: *Credit cards*

Click on the dropdown and select 'Yes' or 'No' to specify if the IP has credit cards in their name.

If you selected 'Yes', continue to Step 21.

If you selected 'No', 'Not Answered', or 'Needs Review', proceed to Step 23.

2. Does the Incapacitated Person have a credit card(s)?

\* Does IP have Credit Card(s): Yes

\* If yes, has it been used during this report period?: Yes

\* What is the balance on the credit card(s)? 456

## 21. Part III, #2 (cont.): *Credit card use*

Click on the dropdown and select 'Yes' or 'No' to specify if the credit card(s) was used during the specified reporting period.

## 22. Part III, #2 (cont.): *Credit card balance*

Click in the field and enter the current balance on the credit card(s).

2. Unspent Income from Previous Year (Part IV, Question 5 from Last Year's Report)

\* Unspent Previous Year Income: 250

## 23. Part IV, #2: *Unspent income*

Verify or enter the IP's unspent income, in U.S. dollars, for the previous reporting year.

**Tip** This amount equals the total income minus the total expenses and, if applicable, can be found in Part IV, Question #5 of the previous year's Guardian of the Estate report.

**Tip** If this is the first Guardian of the Estate report being filed for this IP, leave this field blank. If previous Estate reports for this IP have been filed on paper, and this is the first time it is being recorded in GTS, enter the unspent income from the last paper report.

# How to Enter a Paper-Filed Guardian of the Estate Report



## 24. Part IV, #6:

### Principal Spent

If the Unspent Income (Question #5) is greater than \$0, then the first dropdown in Question #6 will default to 'No'. If this occurred, proceed to Step 27.

6. Is PRINCIPAL SPENT greater than \$0

Principal Spent: No

If the Principal Spent (Question #5) is greater than \$0, then the first field in Question #6 will default to 'Yes'. Click on the second dropdown and select 'Yes' or 'No' to specify if a court order was obtained to spend part of the principal. If 'Yes', continue to Step 25. If 'No', proceed to Step 26.

6. Is PRINCIPAL SPENT greater than \$0

Principal Spent: Yes

\* Invasion of Principal Order: Yes

Invasion of Principal Order Date: 06/07/2022

## 25. (Optional) Part IV, #6 (cont.): Court order date

Click in the **Invasion of Principal Order Date** field and enter the date of the order that authorized the use of the IP's principal to pay expenses. Proceed to Step 27.

## 26. Part IV, #6 (cont.):

### Explanation

Based on the details provided by the guardian, click in the field and enter a summary that explains why court approval was not obtained to use the IP's principal to pay expenses.

6. Is PRINCIPAL SPENT greater than \$0

Principal Spent: Yes

\* Invasion of Principal Order: No

\* Invasion of Principal Explanation: The decree of adjudication of incapacity provided the guardians limited permission to spend principal if a situation should arise that requires

## 27. Part V, #1: Inventory Assets

If the total value of the IP's assets is available electronically from the Inventory report, this field defaults automatically. If this amount displays, continue to Step 28.

PART V. ASSETS

1. What was the value of the assets reported on the Inventory?

\* Inventory Asset: 1801

Note: This is a computed field.

If total value of the IP's assets is not available electronically, click in the field and enter this amount. This can be found on the paper version of the Inventory report. Continue to Step 28.

# How to Enter a Paper-Filed Guardian of the Estate Report



## 28. Part V, #2: Does the IP have assets?

If the IP has assets, regardless of whether they were obtained during the reporting period, and you want to itemize this information, click on the dropdown and select 'Yes'. Continue to Step 29.

If you do not want to itemize the IP's assets or the IP has no assets, click on the dropdown and select 'No'. Proceed to Step 34.

2. List any additional assets received during the Report Period?  
\* Enter additional asset details?: No

## 30. Part V, #2 (cont.): Asset type

Click on the **Asset Type** dropdown and select the option that best describes the type of asset you are recording for the IP.

2. List any additional assets received during the Report Period?  
\* Enter additional asset details?: Yes

Asset Type	Description/Source	Value
Investments (Stocks, Bonds, Mutu...	Savings Bonds	125
SubTotal:		125

## 29. Part V, #2 (cont.): Click the Add Asset icon

## 31. Part V, #2 (cont.): Description/ Source

Click in the **Description/Source** field and enter a summary of the asset as provided by the guardian.

## 32. Part V, #2 (cont.): Value

Click in the **Value** field and enter the amount, in U.S. dollars, that the asset is worth.

## 33. Part V, #2 (cont.): Add other assets

Repeat Steps 29-32 for all the IP's assets.

# How to Enter a Paper-Filed Guardian of the Estate Report



### 34. Part V, #3: *Add/edit a location?*

If you need to add a location to an asset, continue to Step 35.

If you do not need to add a location to any asset, proceed to Step 36.

3. Where are all the assets deposited or held at the end of the Report Period?

Asset Type	Description	Location	Co-Owner(s)	Value	
Personal Property		Storage Unit		1000	SOLD ↔
Investments (Stocks, Bc	Savings Bonds			125	SOLD ↔
				SubTotal:	
				1125	

### 35. Part V, #3 (cont.): *Location*

Click in the **Location** field and add the address or specific location for any applicable asset.

### 36. Part V, #4: *Housing*

Click on the dropdown and select 'Yes' or 'No' to specify if the IP owns a house/condo/co-op.

If you selected 'Yes', continue to Step 37.

If you selected 'No', 'Not Answered', or 'Needs Review', proceed to Step 46.

4. Does the Incapacitated Person own a house/condo/co-op?

\* Real Estate Ownership:

Address	Does the IP live in the house/condo/co-op?	If purchased during the Report Period, what was the purchase price?	Relation	
417 Maple Ave. Sandy	Yes			+

### 37. Part V, #4 (cont.): Click the *Add Asset icon*

### 38. Part V, #4 (cont.): *Address*

Click in the Address field and enter the street address, city, state, and zip code of the IP's house/condo/co-op.

### 39. Part V, #4 (cont.): *IP's residence?*

Click on the dropdown and select 'Yes' or 'No' to specify if the IP lives in this house/condo/co-op.

### 40. Part V, #4 (cont.): *Purchase price*

If the house/condo/co-op was purchased during the reporting period, enter the purchase price. If not, leave this field blank.

# How to Enter a Paper-Filed Guardian of the Estate Report



## 41. Part V, #4 (cont.): Sale price

If the house/condo/co-op was sold during the reporting period, enter the sale price. If not, leave this field blank.

## 43. (Optional) Part V, #4 (cont.): Court order date

Click in the **Court Order Date** field and enter the date of the order that authorized the purchase or sale of the property. Proceed to Step 45.

## 45. Part V, #4 (cont.): Add other properties

Repeat Steps 37-44 to add any other properties owned by the IP.

## 47. Part V, #5 (cont.): Asset Transferred icon

Under Part V, #3, click the icon that corresponds to the asset type that was transferred.

Property was sold during the reporting period at the sale price?	Was a court order obtained if property was purchased or sold?	Court Order Date	Explanation
137000	Yes	07/21/2022	

## 42. Part V, #4 (cont.): Court order?

Click on the dropdown and select 'Yes' or 'No' to specify if a court order was obtained to purchase or sell the property. If 'Yes', continue to Step 43. If 'No', proceed to Step 44.

## 44. Part V, #4 (cont.): Explanation

Based on the details provided by the guardian, click in the field (not pictured) and enter a summary that explains why court approval was not obtained to purchase or sell the property.

## 46. Part V, #5 Asset Transferred?

If none of the IP's assets were transferred to a third-party during the reporting year, proceed to Step 55.

If one or more assets were transferred to a third party, continue to Step 47.

Asset Type	Description	Location	Co-Owner(s)	Value
Real Property	Condo			110000
				SubTotal: 110000

# How to Enter a Paper-Filed Guardian of the Estate Report



## 48. Part V, #5

**(cont.): Name of third party**

In the Transfer Asset popup, click in the **Name of the third Party...** field and enter the name of the person to whom the asset was transferred.

## 50. (Optional) Part V, #5 (cont.): Court order?

Click on the dropdown and select 'Yes' or 'No' to specify if a court order was obtained to transfer the property. If 'Yes', continue to Step 51. If 'No', proceed to Step 52.

## 52. (Optional) Part V, #5 (cont.): Explanation

Click in the **Explanation** field and summarize the reasons provided for transferring the property and, if applicable, why the court's permission was not obtained.

## 54. Part V, #5

**(cont.):  
Complete other transfers**

Repeat Steps 47-53 for any other assets that were transferred.

## 49. (Optional) Part V, #5 (cont.): Relationship to IP

Click in the **Relationship to the IP...** field and specify the recipient's relationship to the IP.

## 51. (Optional) Part V, #5 (cont.): Court order date

Click in the **Court Order Date** field and enter the date of the order that authorized the asset transfer to the third party.

## 53. Click SUBMIT

The screenshot shows a 'Transfer Asset' popup window with the following fields and values:

- Asset Type: Real Property
- Description: Condo
- \* Name of the third Party to whom asset was transferred to: Joseph Zimmerman
- Relationship to the IP of the third party to whom asset was transferred to: Grandson
- \* Value: 110000
- \* Was a court order obtained: Yes
- \* Court Order Date: 06/08/2022
- Explanation: The property at 417 Maple
- Submit button

Annotations with lines pointing to the form fields:

- Step 48 points to the 'Name of the third Party...' field.
- Step 49 points to the 'Relationship to the IP...' field.
- Step 50 points to the 'Was a court order obtained:' dropdown.
- Step 51 points to the 'Court Order Date:' field.
- Step 52 points to the 'Explanation:' field.
- Step 53 points to the 'Submit' button.

# How to Enter a Paper-Filed Guardian of the Estate Report



## 55. Part VI, #1: Guardian Compensation

Click on the dropdown and select 'Yes' or 'No' to specify if you received compensation for your efforts as a guardian.

If 'Yes', continue to Step 56.

If 'No', 'Not Answered', or 'Needs Review', proceed to Step 64.

## 58. Part VI, #1 (cont.): Guardian name

Verify that the correct name appears in the **Guardian Name** field automatically or click on the dropdown and select the correct option.

## 59. Part VI, #1 (cont.): *Free frequency*

Click on the **Fee Frequency** dropdown and select the option that best describes the time interval in which the guardian routinely charged their fees.

**Tip:** The **Amount** field is sum of all compensation from the reporting year.

**Tip:** The **If Hourly, # of Hours** field is only used if the **Fee Frequency** is 'Hourly.' If so, enter the total hours worked during the reporting year.

PART VI. GUARDIAN'S COMPENSATION

1. Did the Guardian receive compensation during the Report Period?

\* Guardian Compensation: Yes

Complete the table below

Guardian Name	Amount	Fee Frequency	If Hourly, # of Hours	
Joseph K Zimmerman	100	Annual		

## 56. Part VI, #1 (cont.): Click the Add Compensation icon

## 57. Part VI, #1 (cont.): *Amount*

Click in the **Amount** field and enter the total amount, in U.S. dollars, received in compensation for guardianship services during the reporting year.

## 60. Part VI, #1 (cont.): *Add other compensation*

Repeat Steps 56-59 for any other guardians that received compensation during the reporting period.

# How to Enter a Paper-Filed Guardian of the Estate Report



## 61. Part VI, #2: Compensation approved?

If the answer to Question #1 above is 'Yes', click on the dropdown and select the appropriate option to specify if the court authorized the compensation to the guardians.

If you selected 'Yes', continue to Step 62.

If you selected 'No', proceed to Step 63.

If you selected 'Not Answered' or 'Needs Review' for Question #1 above, proceed to Step 64.

2. Was the compensation approved by the court?

\* Guardian Compensation Approved: Yes

\* Guardian Compensation Order Date: 07/20/2022

## 62. Part VI, #2 (cont.): Court order date

Click in the **Guardian Compensation Order Date** field and enter the date of the order that authorized the compensation. Proceed to Step 64.

## 63. Part VI, #2 (cont.): Explanation

Based on the details provided by the guardian, click in the field and enter a summary that explains why court approval was not obtained to compensate the guardian.

2. Was the compensation approved by the court?

\* Guardian Compensation Approved: No

\* Guardian Compensation Explanation:

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

\* Guardian Activity Log: Yes

Please attach a copy using the (Upload Document) button found at the bottom of the page.

## 64. Part VI, #3: Activities log

Click on the dropdown and select an option to specify if the guardian maintained a log of the activities completed on behalf of the IP.

**Tip** If you select 'Yes', you can upload a copy of the log, if available, to the Guardian of the Estate report. This can be completed in Step 120. The document must be saved as a PDF.

# How to Enter a Paper-Filed Guardian of the Estate Report



## 65. Part VII, #1: Attorney fees

Click on the dropdown and select 'Yes' or 'No' to specify if fees were paid for attorney services during the reporting year.

If you selected 'Yes', continue to Step 66.

If you selected 'No', 'Not Answered', or 'Needs Review', proceed to Step 76.

66. Part VII, #1 (cont.): Click the Add Attorney Fee icon

## 67. Part VII, #1 (cont.): Name of counsel

Verify that the correct name appears in the **Name of Counsel** field automatically or click on the dropdown and select the correct person.

68. Part VII, #1 (cont.): Rate vs. total fee

Select this checkbox if you do not have a total fee amount, but have the number of hours the attorney worked on the case and their hourly rate.

If you select this checkbox, continue to Step 69.

## 69. Part VII, #1 (cont.): Rate

Click in the **Rate** field and enter the amount of money, in U.S. dollars, that the attorney charged per hour to work on the case.

70. Part VII, #1 (cont.): Hours  
Click in the **Hours** field and enter the number of hours the attorney worked on the case. Proceed to Step 72.

# How to Enter a Paper-Filed Guardian of the Estate Report



## 71. Part VII, #1 (cont.): Fee amount

Click in the **Fee Amount** field and enter the total amount, in U.S. dollars, that the attorney charged to work on the case during the reporting year.

PART VII. ATTORNEY'S FEES

1. Were attorney's fees paid during the Report Period?

\* Attorney Compensation: Yes

If yes, provide the following information

Name of Counsel	Enter Rate and Hours to compute Fee Amount	Fee Amount	Ra
Blake Joseph	<input type="checkbox"/>	2250	

## 72. Part VII, #1 (cont.): Court order?

Click on the dropdown and select 'Yes' or 'No' to specify if a court order was obtained to pay attorney fees from the IP's income or estate. If 'Yes', continue to Step 73. If 'No', proceed to Step 74.

## 73. (Optional) Part VII, #1 (cont.): Court order date

Click in the **Court Order Date** field and enter the date of the order that authorized the use of the IP's income or estate to pay the attorney fees. Proceed to Step 75.

e following information

Hours	Was a court order obtained	Court Order Date	Explanation
	Yes	06/28/2022	

## 74. Part VII, #1 (cont.): Explanation

Based on the details provided by the guardian, click in the field (not pictured) and enter a summary that explains why court approval was not obtained to use the IP's income or estate to pay for attorney fees.

## 75. Part VII, #1 (cont.): Add other fees

Repeat Steps 66-74 for any other guardians that received compensation during the reporting period.

# How to Enter a Paper-Filed Guardian of the Estate Report



## 76. Part VIII,#1a: SSA benefits

Select the checkbox if the IP did NOT receive Social Security Administration (SSA) benefits during the reporting year. Proceed to Step 79.

If you did not select the checkbox, continue to Step 77.

## 78. Part VIII,#1a (cont.): Name of representative payee

Click in the field and enter the name of the person acting as the representative payee of the IP's SSA benefits.

## 80. Part VIII,#1b (cont.): Fiduciary

Click on the dropdown and select 'Yes' or 'No' to specify if the guardian acted as the fiduciary of VA benefits during the reporting period.

If you selected 'Yes', you can upload a copy of the VA report in Step 120. Proceed to Step 82.

If you selected 'No', continue to Step 81.

If you selected 'Not Answered' or 'Needs Review', proceed to Step 82.

## 77. Part VIII,#1a (cont.): Representative payee

Click on the dropdown and select 'Yes' or 'No' to specify if the guardian acted as the representative payee of the SSA benefits during the reporting period.

If you selected 'Yes', you can upload a copy of the SSA in Step 120. Proceed to Step 79.

If you selected 'No', continue to Step 78.

If you selected 'Not Answered' or 'Needs Review', proceed to Step 79.

## 79. Part VIII,#1b: VA benefits

Select the checkbox if the IP did NOT receive Veterans Affairs (VA) benefits during the reporting year. Proceed to Step 82.

If you did not select the checkbox, continue to Step 80.

## 81. Part VIII,#1b (cont.): Name of fiduciary

Click in the field and enter the name of the person acting as the fiduciary of the IP's VA benefits.

# How to Enter a Paper-Filed Guardian of the Estate Report



## 82. Part IX, #1: Surety bond

Confirm that the information appearing in the first dropdown is accurate.

If a bond was required, confirm the amount ordered, and continue to Step 83.

Otherwise, proceed to Step 88.

## 84. Part IX, #1a (cont.): Explanation

Based on the details provided by the guardian, click in the field (not pictured) and enter a summary that explains why the surety bond is no longer in effect.

## 86. Part IX, #1 (cont.): Bond amount increase

Click on the dropdown and select 'Yes' or 'No' to specify if the amount of the surety bond has been increased. If 'Yes', continue to Step 87. If 'No', proceed to Step 88.

## 83. Part IX, #1a: Bond still in effect?

Click on the dropdown and select 'Yes' or 'No' to specify if the surety bond is still in effect. If 'Yes', proceed to Step 85.

If you selected 'No', continue to Step 84.

## 85. Part IX, #1b: Value of the Estate

Click on the dropdown and select 'Yes' or 'No' to specify if the estate value has increased. If 'No', proceed to Step 88.

If it defaults to 'Yes', continue to Step 86.

## 87. Part IX, #1 (cont.): Amount

Click in the **To what amount?** field and enter the new amount of the surety bond.

# How to Enter a Paper-Filed Guardian of the Estate Report



## 88. Part IX, #2: Liability insurance?

If the filer is a professional guardian, agency, or attorney serving as a guardian, continue to Step 89.

For any other response, proceed to Step 91.

2. If you are a professional guardian, agency or an attorney serving as a guardian, do you have professional liability insurance?  Yes  No

\* Professional Liability Insurance: Yes

\* Are the coverage limits greater than the assets (PART V, Question 3 TOTAL)? Yes

\* Describe the deductible and any exclusions: \$15,000 minimum deductible.

## 89. Part IX, #2 (cont.): Coverage & IP's assets

Click on the dropdown and select 'Yes' or 'No' to indicate if the liability coverage exceeds the total amount of the IP's assets listed under Part V, Question #3.

## 90. Part IX, #2 (cont.): Deductibles and exclusions

Based on the details provided by the guardian, click in the field and enter the deductible and any exclusions that apply to the guardian's liability coverage.

PART X. GUARDIAN INFORMATION

1. During this Report Period, did any guardian participate in guardianship training or receive or renew a guardianship certification?  Yes  No

\* Guardianship Training: Yes

If yes, provide the following information:

Guardianship Training/Certification	Guardian Name	Training/Certification

## 91. Part X, #1: Guardian Information

Click on the dropdown and select 'Yes' or 'No' if the guardian participated in any guardianship-related training or received or renewed a guardianship certification.

## 92. Part X, #1 (cont.): Click on the Add Training/Certificates icon

If 'Yes', continue to Step 92.

If 'No', 'Not Answered', or 'Needs Review', proceed to Step 100.

# How to Enter a Paper-Filed Guardian of the Estate Report



## 93. Part X, #1

(cont.): Select an option

Click on the **Guardianship Training/Certification** dropdown and select the 'Training' or 'Certification.'

## 95. Part X, #1

(cont.): Training/certification date

Use the **Training/Certification Date Start** and **End** fields to enter the dates that the training or certification took place.

If you are entering a training, continue to Step 96. For a certification, proceed to Step 97.

**Tip** If it was a one-day training, enter the same date in both fields.

## 97. Part X, #1

(cont.): Description

Based on the details provided, click in the **Description** field and summarize the topics covered.

Proceed to Step 99.

## 94. Part X, #1

(cont.): Name of guardian

Verify that the correct name appears in the **Guardian Name** field automatically or click on the dropdown and select the correct person.

PART X. GUARDIAN INFORMATION

1. During this Report Period, did any guardian participate in guardianship training or certification?

\* Guardianship Training: Yes

If yes, provide the following information

Guardianship Training/Certification	Guardian Name	Training/Certification Start Date	Training/Certification End Date
Training	Cameron B	08/12/2022	08/12/2022

GUARDIAN INFORMATION

this Report Period, did any guardian participate in guardianship training or certification?

\* Guardianship Training: Yes

If yes, provide the following information

Date	Certification Type	Provider	Description
		AOPC	Participated in regional works

## 96. Part X, #1

(cont.): Provider

Click in the **Provider** field and enter the name of the person, organization, or institution that organized and offered the training.

# How to Enter a Paper-Filed Guardian of the Estate Report



## 98. Part X, #1 (cont.):

### Certification type

Click on the **Certification Type** dropdown and select the agency that issued the certification.

Certification Type	Provider	Description
National Certified Guardian (NCG) / Center	National Certi	

## 99. Part X, #1 (cont.):

### Add the training/ certification

Repeat Steps 92-98 for any additional trainings or certifications that were completed by the guardian(s).

**Tip** If two or more co-guardians completed the same training or received the same certification, each individual's participation should be entered separately.

## 100. Part X, #2: Judgment or Bankruptcy?

Click on the dropdown and select 'Yes' or 'No' if a judgment was filed against a guardian or a guardian filed for bankruptcy during the reporting year.

If 'No', 'Not Answered', or 'Needs Review', proceed to Step 105.

If 'Yes', continue to Step 101.

**Tip** A judgment is a court order that resulted from a lawsuit initiated by a person's creditor or debt collector for non-payment.

Guardian Name	Description

## 101. Part X, #2 (cont.): Click the Add Judgment icon

# How to Enter a Paper-Filed Guardian of the Estate Report



## 102. Part X, #2 (cont.): Name of guardian

Click on the **Guardian Name** dropdown and select the name of the guardian that received the judgment or filed for bankruptcy.

2. During this Report Period, have any judgments been filed against any guardian, or has any guardian filed for bankruptcy?

\* Guardian Bankruptcy: Yes

If yes, provide the following information

Guardian Name	Description	
Joseph Zimmerman	Guardian filed for bankruptcy on 1/27/2022.	

## 103. Part X, #2 (cont.): Description

Based on the details provided by the guardian, click in the **Description** field and summarize the circumstances surrounding the judgment or bankruptcy.

## 104. Part X, #2 (cont.): Add other judgments/ bankruptcies

Repeat Steps 101-103 if any co-guardians received a judgment or filed for bankruptcy.

## 106. Part X, #3 (cont.): Click the Add Guardian Criminal Charges icon

3. During this Report Period, was any guardian charged with or convicted of a crime?

\* Guardian Criminal Charges: Yes

If yes, provide the following information

Guardian Name	Description	

## 105. Part X, #3: Criminal activity?

Click on the dropdown and select 'Yes' or 'No' if any guardian was charged with or convicted of a crime during the reporting year.

If 'No', 'Not Answered', or 'Needs Review', proceed to Step 110.

If 'Yes', continue to Step 106.

# How to Enter a Paper-Filed Guardian of the Estate Report



## 107. Part X, #3 (cont.): Name of guardian

Click on the **Guardian Name** dropdown and select the name of the guardian that was charged with or convicted of a crime.

3. During this Report Period, was any guardian charged with or convicted of a crime?

\* Guardian Criminal Charges: Yes

If yes, provide the following information

Guardian Name	Description
Joseph Zimmerman	On 3/31/22, Joseph was charged with driving

## 108. Part X, #3 (cont.): Description

Based on the details provided by the guardian, click in the **Description** field and briefly summarize the nature of the crime.

## 109. Part X, #3 (cont.): Add other charges

Repeat Steps 106-108 if any co-guardians were charged with or convicted of a crime.

## 110. Part X, #4: Guardian Service

Click on the dropdown and select 'Yes' or 'No' if there is any reason that any guardian can no longer serve in this role.

If 'No', 'Not Answered', or 'Needs Review', proceed to Step 115.

## 111. Part X, #4 (cont.): Click the Add Reason icon

4. Is there any reason any guardian cannot continue to serve as a guardian?

\* Guardian Cannot Continue: Yes

If yes, provide the following information

Guardian Name	Description
Joseph Zimmerman	Continued service is no longer in the best int[erest]

If 'Yes', continue to Step 111.

## 112. Part X, #4 (cont.): Name of guardian

Click on the **Guardian Name** dropdown and select the name of guardian that can no longer serve.

## 113. Part X, #4 (cont.): Description

Based on the details provided by the guardian, click in the **Description** field and briefly summarize why the selected guardian can no longer serve.

# How to Enter a Paper-Filed Guardian of the Estate Report



## 114. Part X, #4 (cont.): Add other reasons

Repeat Steps 111-113 if there are any co-guardians that also have reasons why they can no longer serve.

PART XI. SUMMARY	
1. If this is the first annual report, state the value of the assets reported on the Inventory. (Amount from Part I, Question #1)	Note
Value of the assets reported on the Inventory: 1801	
2. If this is not the first Report, state the Total Assets (principal) from the prior Report. (TOTAL Assets from Part I, Question #1)	Note
Prior Total Assets: 0	
3. What was the total amount of Income received during the Report Period? (The amount from Part I, Question #2)	Note
Net Income: 9810	
4. What is the total amount of Expenses paid during the Report Period? (The amount from Part I, Question #3)	Note
Total Expenses: 9900	
5. What are the Total Assets remaining at the end of the Report Period? (The amount from Part I, Question #4)	Note
Total Assets: 11125	
6. What is the Unspent Income at the end of the Report Period? (The amount from Part I, Question #5)	Note
Unspent Income: 210	

## 115. Part XI: Summary

Review the information in this section for accuracy. Each question refers to the source of each amount that displays. If something is incorrect, return to the appropriate section of this report to make the change.

## 116. Co-guardians?

If there is more than one guardian named on this report under Part I, Question #1, continue to Step 117.

Otherwise, proceed to Step 118.

SIGNATURE AND AFFIRMATION
By answering 'Yes' to this question, I affirm that I possess the consent of all co-guardians of the information I provide is true and correct. Also, by electronically signing this document, I understand that my signature will be recorded on the report.
* Co-guardian consent: <input checked="" type="radio"/> Yes <input type="radio"/> No

## 117. Co-guardians (cont.):

Select the **Yes** or **No** radio button to state whether the signature of the co-guardian(s) appears on the paper report.

**Tip** If any of the co-guardian's information is incorrect, refer to Step 118 as a guide.

# How to Enter a Paper-Filed Guardian of the Estate Report



## 118. Signature and Affirmation (cont.):

### Contact information

Review the guardian's address information.

If any of this information is incorrect, update the guardian's participant record.

**Tip** The **Signature of Guardian** field represents the handwritten signature provided by the guardian on the paper copy.

SIGNATURE AND AFFIRMATION																
Date	Signature of Guardian ?	Name of Guardian	Location	Address Line 1 ?	Address Line 2	Address Line 3	City	State	Zip Code	Territory	Postal Code	Country	Home Phone ?	Office Phone	Ext	Cell Phone
11/26/2022	/s/ Joseph Zimmerman	Joseph Zimmerma	Unit	417 Elm St.			Sai	F	16677			Unit				

Please include any comments you would like to make for this report:

## 119. (Optional) Signature and Affirmation (cont.):

### Comments

If the guardian provided any additional information about the guardianship that was not recorded elsewhere, enter them in the comments field.

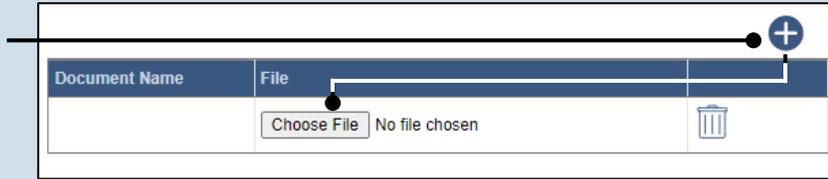
# How to Enter a Paper-Filed Guardian of the Estate Report



## 120. (Optional) Signature and Affirmation (cont.): Documents

If the guardian provided supplemental documents that you want to upload to the report, click the Upload Document icon, then the CHOOSE FILE button, and continue to Step 121.

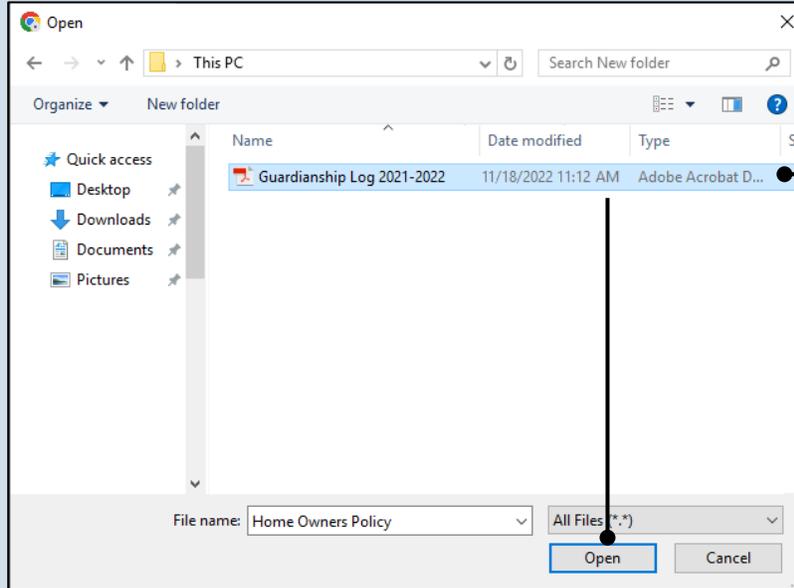
Otherwise, proceed to Step 122.



## 121. Signature and Affirmation (cont.): Documents

In the popup screen that appears, locate the PDF version of the document you have saved on your computer or a movable storage device. Select the file and click OPEN.

**Tip** GTS only accepts documents in a PDF format.



## 122. Select the guardian verification checkboxes

I, the guardian of the Estate, verify that the foregoing information is correct to the best of my knowledge.

I, the guardian of the Estate, further acknowledge that the Notice of Filing must be served with this report.

The information set forth above has, to the extent possible, been entered into the Guardianship Tracking System and the information as reported in the paper filed report. The Court User acknowledges that the information entered into the Guardianship Tracking System contains the information as reported in the paper filed report. The Court User acknowledges that the information entered into the Guardianship Tracking System contains the information as reported in the paper filed report.

\* Next Action:  Save  
 Save and Close  
 Submit

\* Filing Date:

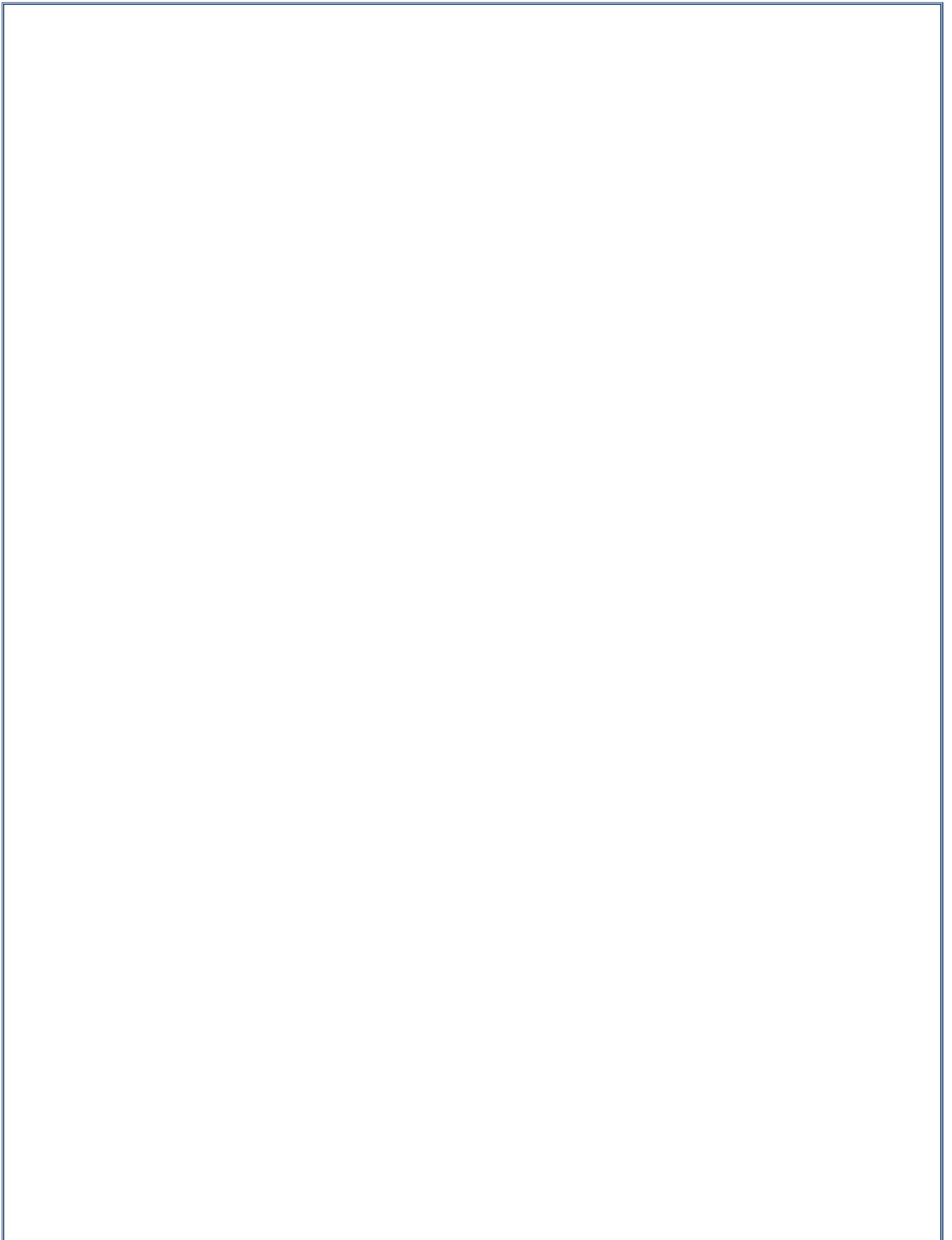
\* Filing Time:

## 123. Select the Submit radio button

## 124. Enter the filed date/time

Use the **Filing Date** and **Filing Time** fields to specify when the paper report was filed in the court.

## 125. Click OK





# How to Enter a Paper-Filed Guardian of the Person Report

## 1. Search for the case

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:

[Advanced Search](#)

## 3. Open the report

Click the Create Report icon next to the Person report.

- [Incapacitated Person](#)
- [Case Actions](#)
- [Guardians](#)
- [Other Case Participants](#)
- [Attorneys](#)
- [Reports](#)
- [Bond Ordered](#)
- [Suppressed Flags](#)

2. In the GTS Case screen, click the Reports tab

**Tip** If there are multiple guardians associated to the Estate domain, you will click the Guardian Selection icon  instead.

Report	Due Date	Status	Flags
Estate	12/01/2022	Eligible for Submission	
Inventory	03/01/2022	Accepted	
Person	12/01/2022	Eligible for Submission	

## 4. Specify the submitter

If the case has more than one guardian, the Guardian Selection popup appears. Click the Create Report icon next to the name of the guardian that submitted the report. Continue to Step 5.

## 5. Part I, #1 & #2: Name of Guardian & Limited Guardianship

On the Report of Guardian of the Person screen, confirm that the information appearing under each of these questions is accurate.

**Guardian Selection**

Guardian	
Boggs, Cameron	
Zimmerman, Joseph K	

If the popup does not appear, continue to Step 5.

**Tip** If this information is incorrect, the existing adjudicatory case action must be removed and replaced with a new one that contains the updated information.

**PART I. INTRODUCTION**

1. Guardian Name(s)  
Guardian Name(s): Joseph Zimmerman

2. Is this a limited Guardianship?  
\* Limited Guardianship:

3. Report Period  
\* Report Type:

\* Report Period Start Date:

\* Report Period End Date:

## 6. Part I, #3: Report Period

Click on the **Report Type** dropdown and select the appropriate option.

# How to Enter a Paper-Filed Guardian of the Person Report



## 7. Part II, #1: IP's DOB

Verify or update the IP's date of birth.

**Tip:** If this information is unavailable, you can leave this field blank.

**PART II. PERSONAL INFORMATION ABOUT THE INCAPACITATED PERSON**

1. Incapacitated Person's date of birth

Incapacitated Person's DOB: 10/10/1936

2. Incapacitated Person's Current Residence

\* Address Line 1: 417 Elm St.

Address Line 2:

\* City: Sandy Ridge

\* State: Pennsylvania

\* Zip Code: 16677

Facility Name (if any):

## 8. Part II, #2: IP's Residence

Verify or update the IP's current address.

## 9. Part II, #3: Type of Residence

Click the **Type of Residence/Facility** dropdown and identify the option that best describes the IP's current residence.

◆ If you choose 'Incapacitated Person's home', click on the dropdown and, if known, select the type of home assistance the IP is receiving.

◆ If you choose 'Relative's home', you can enter the relative's name and relationship (i.e. Child, Sibling, etc.).

◆ If you choose, 'Group Home', 'Personal Care Boarding Home', Assisted Living Facility, or 'Nursing Home Facility', click on the dropdown and, if known, indicate if the IP is in a memory support facility.

◆ If you choose, 'Other', you can describe the residence or facility.

Your Home

3. Residence of the Incapacitated Person

\* Type of Residence/Facility: Your home

Incapacitated Person's Home

3. Residence of the Incapacitated Person

\* Type of Residence/Facility: Incapacitated Person's home

In-home Assistance Type: Part-time home health care aide

Relative's Home

3. Residence of the Incapacitated Person

\* Type of Residence/Facility: Relative's home

\* Relative's Name: Cameron Boggs

\* Relationship: Grandson

Personal Care Boarding, Assisted Living, Nursing Home

3. Residence of the Incapacitated Person

\* Type of Residence/Facility: Personal Care Boarding Home

\* Is this a Memory Support Facility?: Yes

# How to Enter a Paper-Filed Guardian of the Person Report



## 10. Part II, #4:

### *Length of time at residence*

If known, enter the date in which the IP began living at the residence or facility identified in Step 8.

## 11. Part II, #5: *Did the IP move?*

Click on the dropdown and select the appropriate option to specify if the IP moved during the reporting period.

If you selected 'No', 'Not Answered', or 'Needs Review', continue to Step 12.

If you selected 'Yes', enter the date of the move (if available), the reason(s) for the move, and the IP's previous address.

## 12. Part III, #1:

### *Medical Professionals?*

If the IP was seen by a medical professional during the reporting period, continue to Step 13.

If the IP was not seen by any medical professionals, or this information is unavailable, proceed to Step 17.

## 14. Part III, #1

### *(cont.): Medical Professional Type*

Click on the **Medical Professional Type** dropdown and select the option that best describes the type of professional that the IP visited.

Medical Professional Type	Description	Name
Psychologist or Psychiatrist		Dr. Miranda Lovell
Medical Doctor		Dr. Richard Lowe

## 13. Part III, #1

**(cont.): Medical Professional Type**  
Click the Add Medical Professionals icon.

## 15. Part III, #1

**(cont.): Name**  
Click in the **Name** field and enter the name of the doctor or medical professional.

## 16. Part III, #1

### *(cont.): Add other medical professionals*

Repeat Steps 13-15 for any other medical professionals the IP visited.

# How to Enter a Paper-Filed Guardian of the Person Report



## 17. Part III, #2: *Medical/ psychiatric problems*

Based on the details provided by the guardian, list the major medical or psychiatric problems of the IP.

**Tip** If applicable, this information populates automatically from the previous year's report and can be updated as needed.

## 19. Part III, #4: *Hospitalization*

Click on the dropdown and select the appropriate option to specify if the IP was hospitalized during the reporting period.

If you selected 'No', 'Not Answered', or 'Needs Review', continue to Step 20.

If you selected 'Yes', use the **Date(s) of hospitalization** field to list each instance. Continue to Step 20.

The screenshot shows a form with the following sections:

- 2. The major medical or psychiatric problems of the Incapacitated Person are as follows**  
Major medical or psychiatric problems:
- 3. Describe any social, medical, psychological and support services the Incapacitated Person is receiving**  
Support services received:
- 4. Has the Incapacitated Person been hospitalized during the Report Period**  
\* Incapacitated Person Hospitalized:   
Date(s) of hospitalization:
- 5. Has the Incapacitated Person received a mental health assessment during the Report Period?**  
\* Incapacitated Person Mental Health Assessment:   
\* Date(s) of MH Assessment:

## 18. Part III, #3: *Services for the IP*

If known, enter any support services that the IP is receiving.

## 20. Part III, #5: *Mental health assessment*

Click on the dropdown and select the appropriate option to specify if the IP received a mental health assessment during the reporting period.

If you selected 'No', 'Not Answered', or 'Needs Review', continue to Step 21.

If you selected 'Yes', use the **Date(s) of MH Assessment** field to list each instance. Continue to Step 21.

# How to Enter a Paper-Filed Guardian of the Person Report



## 21. Part IV, #1: *Guardian's opinion*

Click on the dropdown and select an option based on the guardian's opinion of how the guardianship should proceed.

**PART IV. GUARDIAN'S OPINION**

1. Should the guardianship be

\* Guardian Opinion: Continued

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

Guardian Opinion Detail: The IP has had no demonstrable change

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

\* Petition to modify/terminate filed: No

## 23. Part IV, #3: *Petition for modification or termination?*

Click on the dropdown and specify if the guardian filed a petition with the court to modify or terminate the guardianship.

## 22. Part IV, #2: *Explanation*

Use the field to list the reasons, if any, the guardian provided to support the recommendation identified in Step 21.

## 25. Part V, #2: *Average length of visit*

Click on the dropdown and select the option that best describes the guardian's average length of visit to the IP.

**PART V. INFORMATION ABOUT THE GUARDIAN**

1. On average, how often did you visit the Incapacitated Person during the Report Period?

\* Visitation Frequency: Daily

2. What is the average length of a visit?

\* Visitation Duration: Between 15 minutes and 1 hour

## 24. Part V, #1: *Visitation*

Click on the dropdown and select the option that best describes how often the guardian visited the IP during the reporting period.

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

\* Guardian Activity Log: Yes

Please attach a copy using the (Upload Document) button found at the bottom of the page.

## 26. Part V, #3: *Guardianship log*

Click on the dropdown and specify if the guardian kept a log of the services they performed on behalf of the IP.

**Tip** If you selected 'Yes', you have the option to upload a copy of the log if it was filed. This can be completed in Step 64.

# How to Enter a Paper-Filed Guardian of the Person Report



## 27. Part V, #4:

*Training/  
Certification*

Click on the dropdown and specify if the guardian participated in training or received/renewed a certification during the reporting period.

If you selected 'No', 'Not Answered', or 'Needs Review', proceed to Step 36.

If you selected 'Yes', continue to Step 28.

## 29. Part V, #4

*(cont.):*

*Select a type*

Click on the **Guardianship Training/Certification** dropdown and select 'Training' or 'Certification.'

## 31. Part V, #4

*(cont.):*

*Training /  
certification date*

Use the **Training/Certification Start** and **End Date** fields to enter the dates that the training or certification occurred.

If you are entering a training, continue to Step 32. For a certification, proceed to Step 34.

**Tip** To specify a single date, enter the same date in both fields.

28. Part V, #4  
(cont.): Click the **Add Training / Certificates** icon

4. During this Report Period, did any guardian participate in guardianship training or certification?

\* Guardianship Training: Yes

Guardianship Training/Certification	Guardian Name	Training/Certification Start Date	Training/Certification End Date
Training	Joseph Zirr	10/12/2022	10/12/2022

## 30. Part V, #4

*(cont.):*

*Name of  
guardian*

Click on the **Guardian Name** dropdown and select the guardian that received the training or certification.

# How to Enter a Paper-Filed Guardian of the Person Report



## 32. Part V, #4

(cont.): *Provider*

Click in the **Provider** field and enter the name of the individual, organization, or institution that offered the training.

## 33. Part V, #4 (cont.):

*Description*

Based on the details provided by the guardian, click in the **Description** field and provide a brief summary of the training. Proceed to Step 35.

## 34. Part V, #4

(cont.):

*Certification type*

Click on the **Guardian Certification Type** dropdown and select the agency that issued the certification.

## 35. Part V, #4 (cont.):

*Add other trainings/certifications*

Repeat Steps 28-34, as needed, to add any other trainings or certifications.

## 36. Part V, #5:

*Criminal activity?*

Click on the dropdown and select the appropriate option to specify if the guardian has been charged or convicted of a crime during the reporting period.

If you selected 'No', 'Not Answered', or 'Needs Review', proceed to Step 41.

If you selected 'Yes', continue to Step 37.

## 37. Part V, #5: Click the Add Guardian Criminal Charges icon

# How to Enter a Paper-Filed Guardian of the Person Report



## 38. Part V, #5 (cont.):

*Name of guardian*

Click on the **Guardian Name** dropdown and select the guardian that has been charged or convicted.

5. During this Report Period, was any guardian charged with or convicted of a crime?

\* Guardian Criminal Charges: Yes

Guardian Name	Criminal Charge Description	
Joseph Zimmerman	On 3/31/22, Joseph was charged with	

## 39. Part V, #5 (cont.):

*Description*

Click in the **Description** field and state the nature of the crime, if known, for which the guardian has been charged or convicted.

## 40. Part V, #5 (cont.):

*Add other charges*

Repeat Steps 37-39, as needed, for any co-guardians that have been charged or convicted of a crime during the reporting period.

## 42. Part V, #6: Click the Add Guardian Criminal Charges icon

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

\* Guardian PFA/PFSVI Ordered: Yes

Guardian Name	PFA/PFSVI Description	

## 41. Part V, #6: PFA or PSVI?

Click on the dropdown and select the appropriate option to specify if an order for Protection from Abuse (PFA) or Protection from Sexual Violence or Intimidation (PSVI) was entered against a guardian.

If you selected 'No', 'Not Answered', or 'Needs Review', proceed to Step 46.

If you selected 'Yes', continue to Step 42.

# How to Enter a Paper-Filed Guardian of the Person Report



## 43. Part V, #6 (cont.):

*Name of guardian*

Click on the **Guardian Name** dropdown and select the guardian that had the order entered against them.

6. During this Report Period, was a Protection from Abuse Order or Protection from Sexual Violence?

\* Guardian PFA/PFSVI Ordered: Yes

Guardian Name	PFA/PFSVI Description	
Joseph Zimmerman	The order was entered on 3/3/22 ba	

## 44. Part V, #6 (cont.):

*Description*

Click in the **Description** field and summarize the nature of the order, if known, that was entered against the guardian.

## 45. Part V, #6 (cont.):

*Add other orders*

Repeat Steps 42-44, as needed, to add this information for any co-guardians that have had a PFA or PSVI order entered against them.

## 47. Part V, #7:

**Click the Add Guardian Cannot Continue icon**

7. Is there any reason any guardian cannot continue to serve as guardian?

\* Guardian Cannot Continue: Yes

Guardian Name	Description	

## 46. Part V, #7:

*Guardian Service*

Click on the dropdown and select the appropriate option to specify if any guardian can no longer serve.

If you selected 'Yes', continue to Step 47.

If you selected 'No', 'Not Answered', or 'Needs Review', proceed to Step 60.

# How to Enter a Paper-Filed Guardian of the Person Report



## 48. Part V, #7 (cont.):

*Name of guardian*

Click on the **Guardian Name** dropdown and select the guardian that can no longer continue to serve.

7. Is there any reason any guardian cannot continue to serve as guardian?

\* Guardian Cannot Continue: Yes

Guardian Name	Description
Joseph Zimmerman	Continued service is no longer in the

## 49. Part V, #7 (cont.): *Description*

Based on the details provided by the guardian, click in the **Description** field and briefly summarize why the guardian can no longer serve.

## 50. Part V, #7 (cont.):

*Add other reasons*

Repeat Steps 47-49, as needed, to add this information for any other co-guardians that can no longer serve.

# How to Enter a Paper-Filed Guardian of the Person Report



## 51. Part V, #8: Guardian Compensation

Click on the dropdown and select 'Yes' or 'No' to specify if you received compensation for your efforts as a guardian.

If 'Yes', continue to Step 52.

If 'No', 'Not Answered', or 'Needs Review', proceed to Step 60.

## 53. Part V, #8 (cont.): Amount

Click in the **Amount** field and enter the total amount, in U.S. dollars, received in compensation for guardianship services during the reporting year.

## 55. Part V, #8 (cont.): Free frequency

Click on the **Fee Frequency** dropdown and select the option that best describes the time interval in which the guardian routinely charged their fees.

**Tip:** The **Amount** field is sum of all compensation from the reporting year.

**Tip:** The **If Hourly, # of Hours** field is only used if the **Fee Frequency** is 'Hourly.' If so, enter the total hours worked during the reporting year.

## 52. Part V, #8 (cont.): Click the Add Compensation icon

## 54. Part VI, #8 (cont.): Guardian name

Verify that the correct name appears in the **Guardian Name** field automatically or click on the dropdown and select the correct option.

## 56. Part V, #8 (cont.): Add other compensation

Repeat Steps 52-55 for any other guardians that received compensation during the reporting period.

8. Did the Guardian receive compensation during the Report Period?

\* Guardian Compensation: Yes

Complete the table below

Amount	Guardian Name	Fee Frequency	If Hourly, # of Hours	
100	Joseph Zimmermar	Annual		

# How to Enter a Paper-Filed Guardian of the Person Report



## 57. Part V, #9: Compensation approved?

If the answer to Question #8 above is 'Yes', click on the dropdown and select the appropriate option to specify if the court authorized the compensation.

9. Was the compensation approved by the court?

\* Guardian Compensation Approved: Yes

\* Guardian Compensation Order Date: 07/20/2022

If you selected 'Yes', continue to Step 58.

If you selected 'No', proceed to Step 59.

If you selected 'Not Answered' or 'Needs Review', proceed to Step 60.

## 59. Part VI, #9 (cont.): Explanation

Based on the details provided by the guardian, click in the field and enter a summary that explains why court approval was not obtained to compensate the guardian.

**61. Co-guardians**  
Select the **Yes** or **No** radio button to state whether the signature of the co-guardian(s) appears on the paper report.

**Tip** If any of the co-guardian's information is incorrect, refer to Step 62 as a guide.

SIGNATURE AND AFFIRMATION

By answering "Yes" to this question, I affirm that I possess the consent of all co-guardians of the information I provide is true and correct. Also, by electronically signing this document, I un

\* Co-guardian consent:  Yes  No

## 58. Part VI, #9 (cont.): Court order date

Click in the **Guardian Compensation Order Date** field and enter the date of the order that authorized the compensation. Proceed to Step 60.

## 60. Co-guardians?

If there is more than one guardian named on this report under Part I, Question #1, continue to Step 61.

Otherwise, proceed to Step 62.

# How to Enter a Paper-Filed Guardian of the Person Report



## 62. Signature and Affirmation

**(cont.): Contact information**

Review the guardian's address information. If it is incorrect, save and exit the report and then update the guardian's participant record.

**Tip:** The **Signature of Guardian** field represents the handwritten signature provided by the guardian on the paper copy.

Date	Signature of Guardian ?	Name of Guardian	Location	Address Line 1 ?	Address Line 2	Address Line 3	City	State	Zip Code	Territory	Postal Code	Country	Home Phone ?	Office Phone	Ext	Cell Ph
11/23/2022	/s/ Joseph Zimmerman	Joseph Zimmerma	Unit ▼	417 Elm St.			Sar	F ▼	16677			Unit ▼	( ) - ( )	( ) - ( )		( ) - ( )

Please include any comments you would like to make for this report:

## 63. (Optional) Signature and Affirmation (cont.): Comments

If the guardian provided any additional information about the guardianship that was not recorded elsewhere, enter them in the comments field.

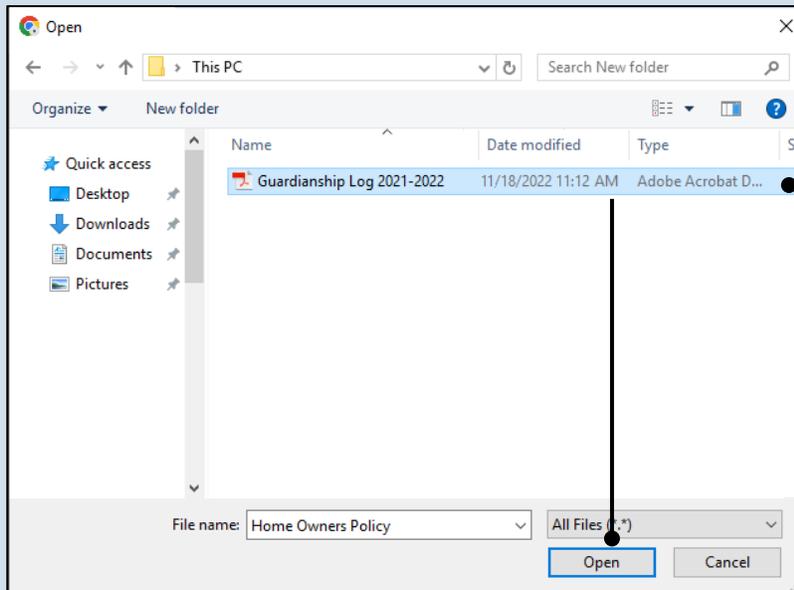
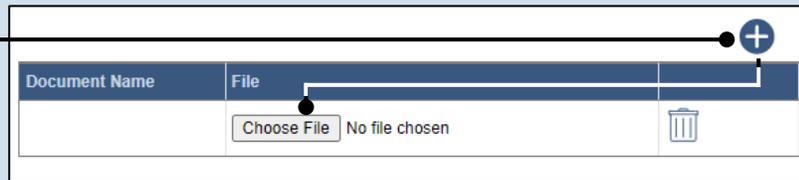
# How to Enter a Paper-Filed Guardian of the Person Report



## 64. (Optional) Signature and Affirmation (cont.): Documents

If the guardian provided supplemental documents that you want to upload to the report, click the Upload Document icon, then the CHOOSE FILE button, and continue to Step 65.

Otherwise, proceed to Step 66.



## 65. Signature and Affirmation (cont.): Documents

In the popup screen that appears, locate the PDF version of the document you have saved on your computer or a movable storage device. Select the file and click OPEN.

**Tip** GTS only accepts documents in a PDF format.

## 66. Select the guardian verification checkboxes

I, the guardian of the Person, verify that the foregoing information is correct to the best of my knowledge.

I, the guardian of the Person, further acknowledge that the Notice of Filing must be served with this report.

The information set forth above has, to the extent possible, been entered into the Guardianship Tracking System as accepted by the Guardianship Tracking System contains the information as reported in the paper signed by the guardian.

\* Next Action:  Save  
 Save and Close  
 Submit

\* Filing Date: mm/dd/yyyy

\* Filing Time: --:-- --

Ok Cancel View Draft

## 67. Select the Submit radio button

## 68. Enter the filed date/time

Use the **Filing Date** and **Filing Time** fields to specify when the paper report was filed in the court.

## 69. Click OK



# 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.

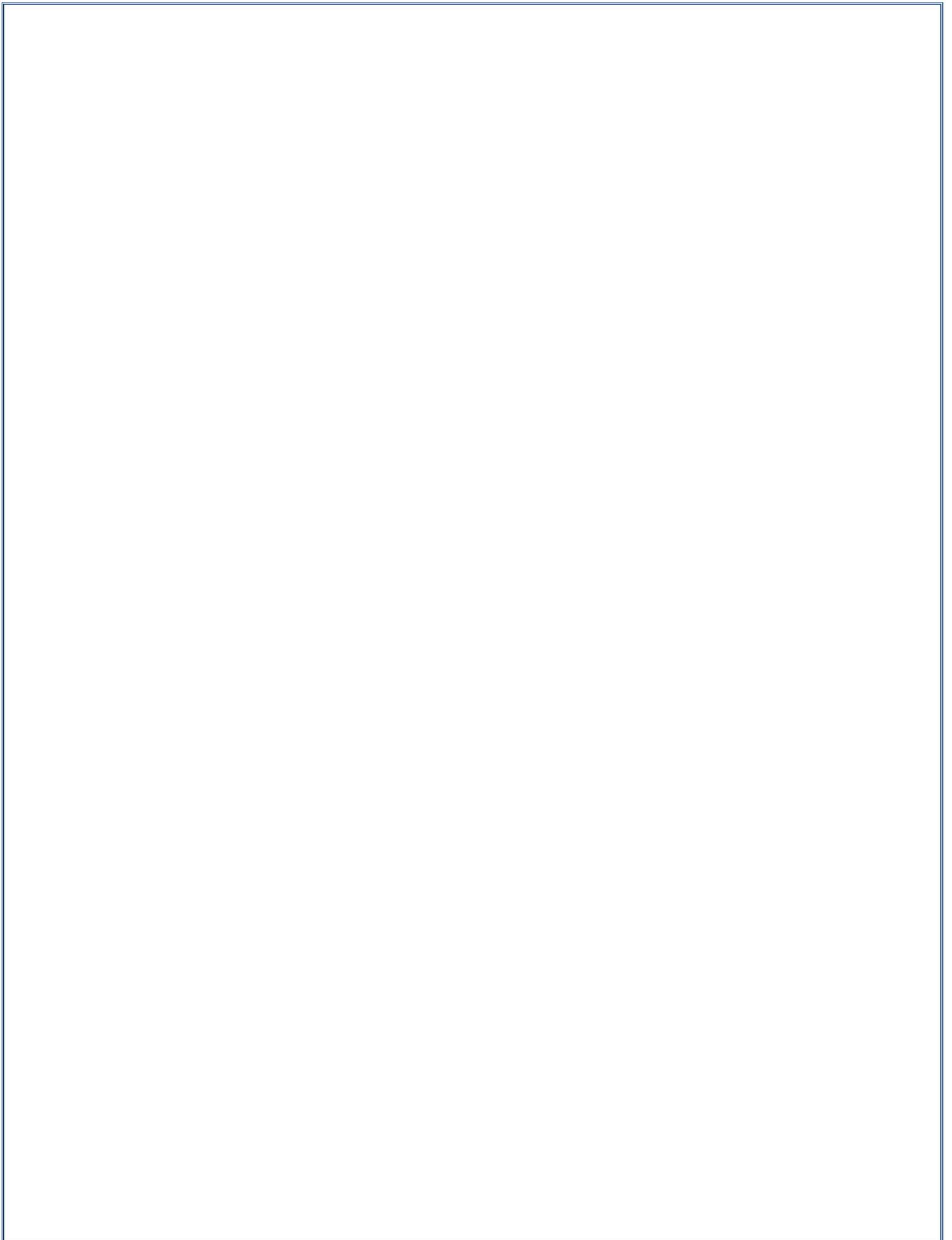
## 4. Click SEARCH

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

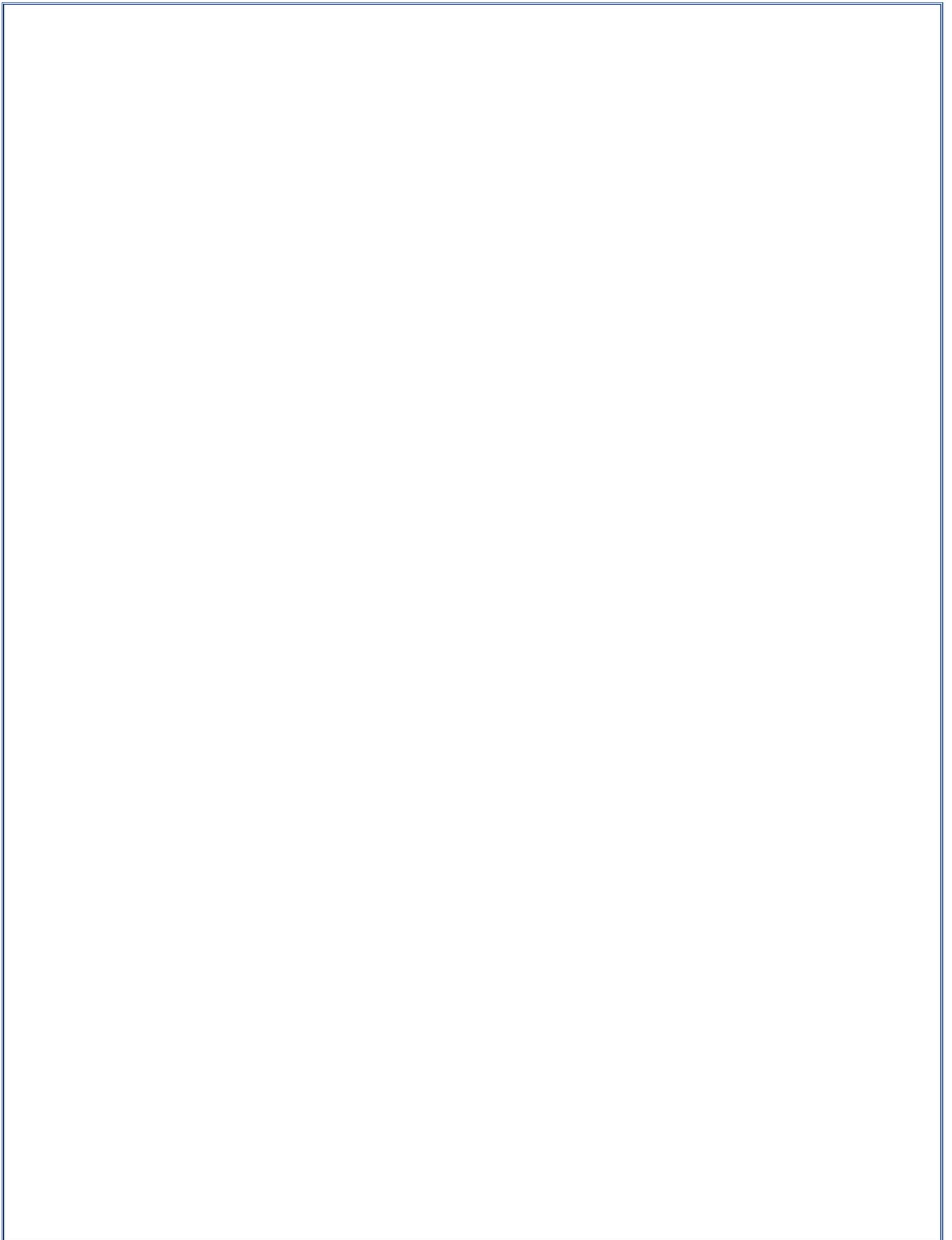
## 5. (Optional) Choose the case to open

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





# 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:

[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

## 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:

\* Filing Type:

\* Filing Date:

Filing Time:

\* Judicial Authority:

## 6. Choose the judicial authority

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

# Add an Adjudication of Incapacity Case Action



## 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 adjudatory 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 Incape
- \* 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

Annotations with arrows point to the following fields:

- Step 7: IP Was Represented at Hearing
- Step 8: Attorney Was Court Appointed
- Step 9: Attorney Was Paid By Estate
- Step 10: Interpreter Was Requested
- Step 11: Interpreter Was Appointed
- Step 12: Interpreter Language

## 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.

# Add an Adjudication of Incapacity Case Action



## 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)

- Organization
- Person
- Estate

## 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.

# Add an Adjudication of Incapacity Case Action



## 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.

### 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

## 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 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**

# Add an Adjudication of Incapacity Case Action



## 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.

# Add an Adjudication of Incapacity Case Action



## 24. Generate the User Access Code Letter

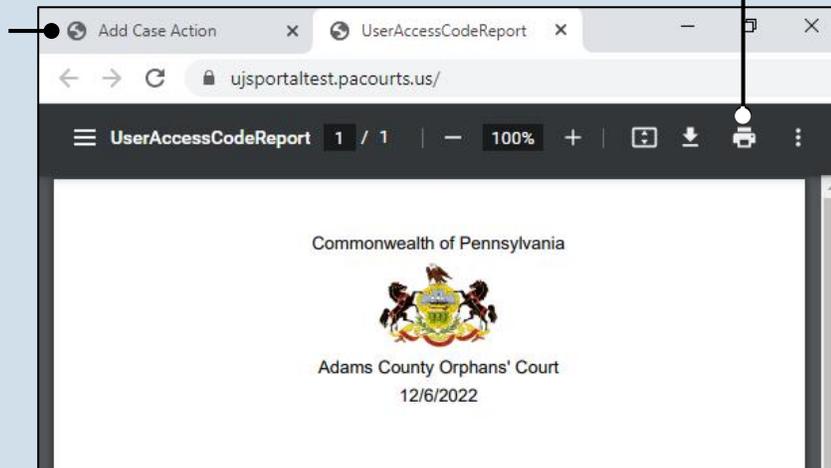
In the Ordered Guardian(s) grid of the Add Case Action screen, click the Print User Access Code Letter icon appearing to the right of the appropriate guardian.

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

A new browser tab will open.

## 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.



## 25. Print the Access Code Letter

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

## 28. (Optional) Add other guardians

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

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

## 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.

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

# Add an Adjudication of Incapacity Case Action



## 29. Is the guardian an organization?

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

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.

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.

## 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.

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

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

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 required)

Guardian Number: (One or more required)

Works in County: (One or more required)

Professional Guardians Only:

Attorneys Only:

Search

<input checked="" type="checkbox"/>	Name	Type	Address	Identifiers	Date o	Date c	Activ	Alerts
<input checked="" type="checkbox"/>	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.

# Add an Adjudication of Incapacity Case Action



### 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: [dropdown]

Prefix: [dropdown]

First Name: Phil

Middle Name: [text box]

\* Last Name: Sheridan

Generation: [dropdown]

Suffix: [dropdown]

Title: [dropdown]

\* Address Type: Home

Location:  International  United States

\* Address: 5095 Ritter Road

[text box]

[text box]

\* City: Mechanicsburg

\* State: Pennsylvania

\* Zip Code: 17055

\* County: Cumberland

Comments: [text area]

Address Unknown:

Date of Birth: mm/dd/yyyy

SSN: [text box]

Agency Personnel Role: [dropdown]

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)

<input checked="" type="checkbox"/>	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.

# Add an Adjudication of Incapacity Case Action



## 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"/>

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

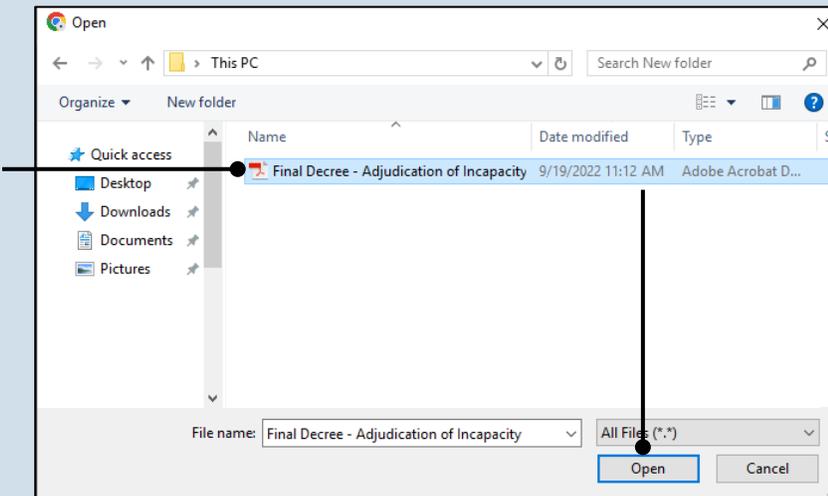
## 38. (Optional) Begin the process of uploading the order

Click the CHOOSE FILE button.

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

## 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.

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

Ok

## 40. Save the case action

In the Add Case Action screen, click OK.



# 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

# 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.

## 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.

## 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 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 o 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 o 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

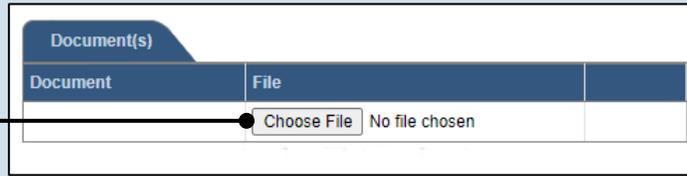
## 14. Click CREATE

# Add a Case Action (except Adjudication of Incapacity)

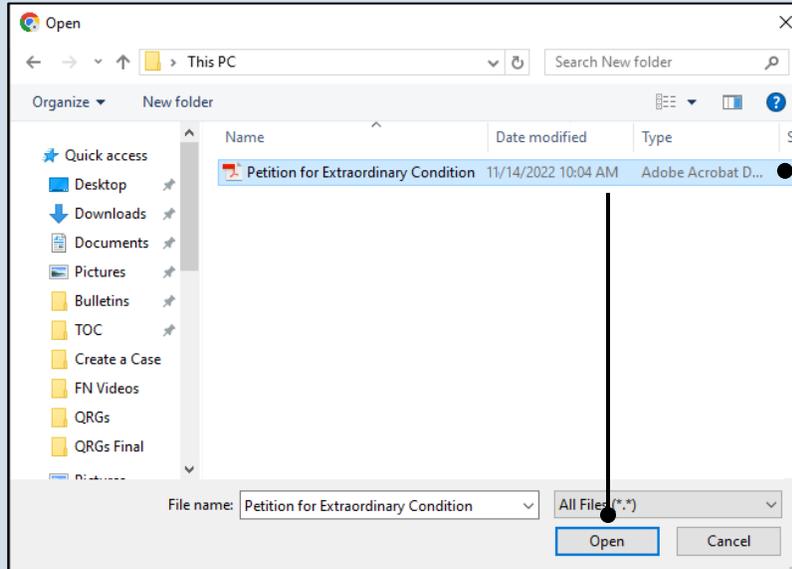


## 15. (Optional) Begin the process of uploading a document

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.



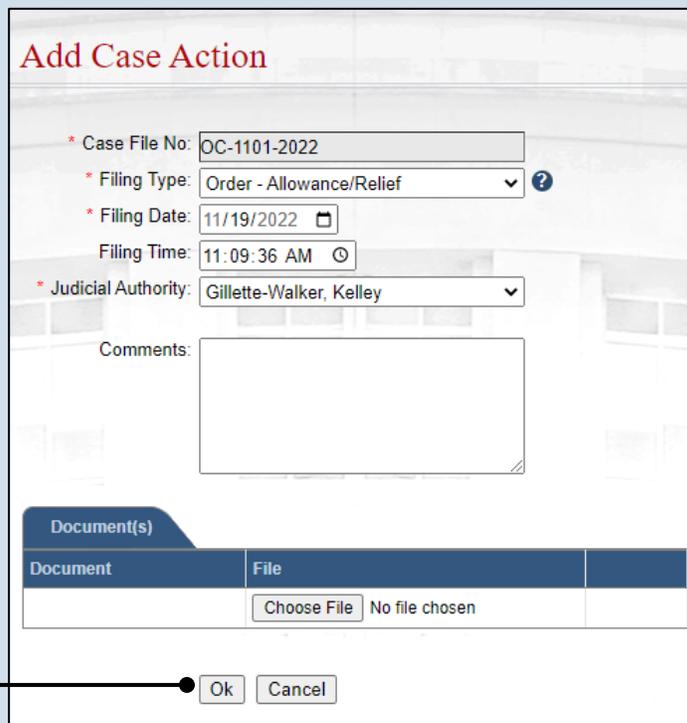
## 16. Upload the electronic version of the petition

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.



# Available Case Actions

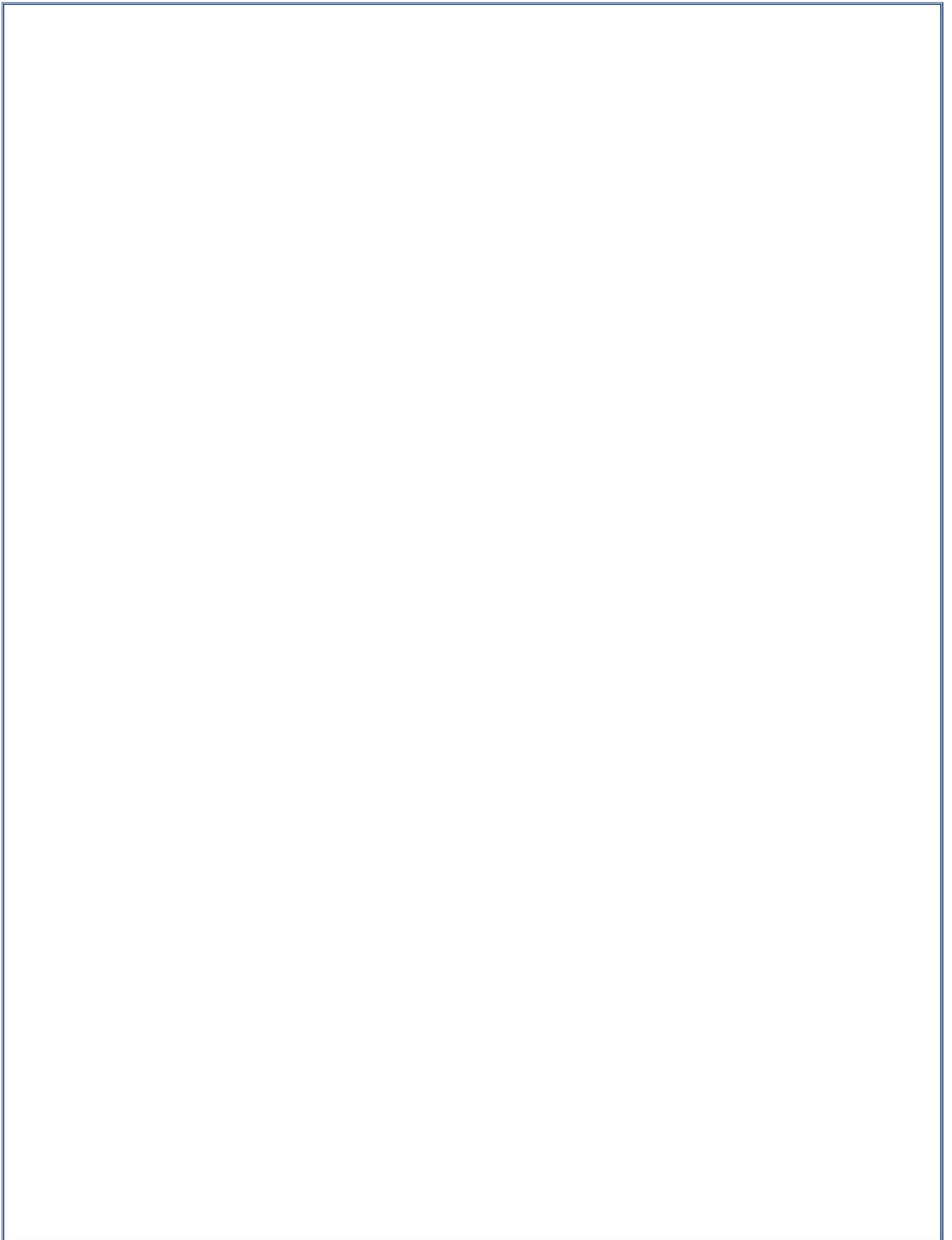


## ► Note about GTS Case Actions

The following represents the complete list of case actions that can be recorded in the GTS. This list is likely to be shorter than the list of case actions available in your case management system, but it represents those actions that are vital to GTS reports and statistics.

GTS case actions are not always going to match, word-for-word, the corresponding case action in your case management system. Therefore, choose the best option when adding a case action in the GTS.

- ◆ Annual Report Waived
- ◆ Background Verification Submitted
- ◆ Emergency Case Closed
- ◆ Emergency Decree – Emergency Guardian Appointed
- ◆ Emergency Decree – Emergency Guardian Appointment Denied
- ◆ Emergency Decree – Emergency Guardian Appointment Expired
- ◆ Emergency Petition for Adjudication of Incapacity and Appointment of Guardian
- ◆ Final Accounts Filed
- ◆ Final Decree – Adjudication of Incapacity/Appointment of Guardian
- ◆ Final Decree – Petition for Adjudication of Incapacity Denied
- ◆ Final Decree – Petition for Adjudication of Incapacity Resolved – Less Restrictive Alternative
- ◆ Final Order of Court – Case Transferred
- ◆ Guardian Involuntarily Removed
- ◆ Guardian Voluntarily Removed
- ◆ Incapacitated Person Deceased Prior to Final Decree
- ◆ Order – Allowance/Relief
- ◆ Order – Gift Expense Granted
- ◆ Order – Denying Restoration of Rights
- ◆ Order – Granting Restoration of Rights
- ◆ Order – Guardian Compensation
- ◆ Order – Invasion of Principal Granted
- ◆ Order – Judicial Waiver of Professional Guardian Certification
- ◆ Order – Modify to Add Guardian
- ◆ Order – Petition Dismissed
- ◆ Order – Real Property
- ◆ Order – Removal of Judicial Waiver for Professional Guardian Certification
- ◆ Order – Successor Guardian Appointed
- ◆ Order Denying Extraordinary Condition Petition
- ◆ Order Granting Extraordinary Condition Permission
- ◆ Order Granting Partial Restoration of Capacity
- ◆ Order of Court – Accounting Ordered
- ◆ Order of Court – Accounting Waived
- ◆ Petition for Acceptance of Guardianship Transfer
- ◆ Petition for Adjudication of Incapacity and Appointment of Guardian
- ◆ Petition for Adjudication of Incapacity Withdrawn
- ◆ Petition for Extraordinary Condition Permission
- ◆ Petition for Restoration of Rights
- ◆ Petition to Accept Transfer Case Denied
- ◆ Review Hearing

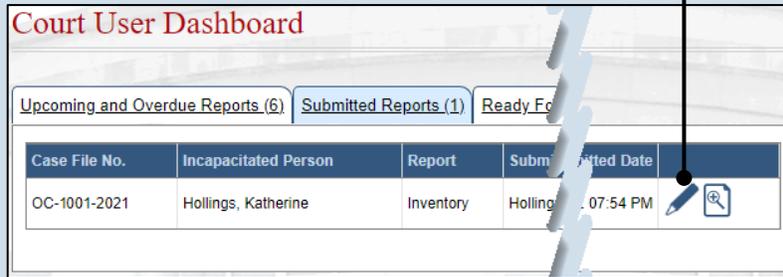




# How to Accept to Return a Report for Correction

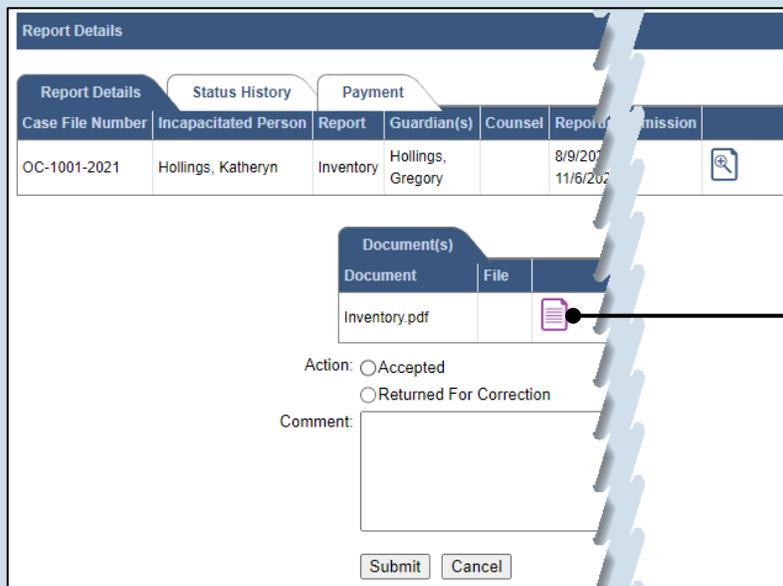
## 1. Open the report details

In the Submitted Reports tab of your Dashboard, click the View Report Details icon for the appropriate report.



## 2. Open the full report

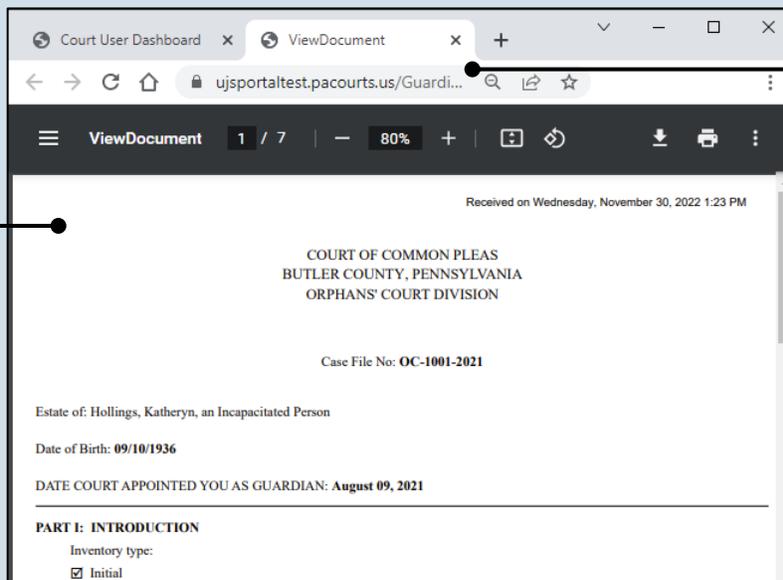
In the Report Details popup, click the Document icon in the Document(s) grid for the report.



## 3. Review the report

A PDF version of the report opens in a new tab. Review the information that was submitted.

**Tip:** Depending on your browser and settings, the PDF may open in a new window instead.



## 4. Return to the Web Portal

Close the tab or window displaying the PDF document to return to the Web Portal.

# How to Accept to Return a Report for Correction



## 5. Accept the report or return it for corrections

If you did not find any problems when reviewing the report, select the **Accepted** radio button and proceed to Step **Error! Reference source not found.**

If you found that the report needs to have corrections made, select the **Returned For Correction** radio button and continue to Step 6.

The screenshot shows the 'Report Details' form with the following data:

Case File Number	Incapacitated Person	Report	Guardian(s)	Counsel	Reporting Period	Due Date
OC-1001-2021	Hollings, Kathryn	Inventory	Hollings, Gregory		8/9/2021 - 11/6/2021	11/07/202

Document(s) section:

Document	File
Inventory.pdf	

Action:  Accepted  Returned For Correction

Comment: A debt/liability is shown without an amount (\$0.00).

Buttons: Submit, Cancel

## 6. Enter Comments

Use the **Comments** field to explain why the report needs to be corrected.

**Tip** Be as detailed as possible. **Comments** are sent via notification to the party that submitted the report.

## 7. Click SUBMIT

The report has been processed. You are returned to the Dashboard.



# 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

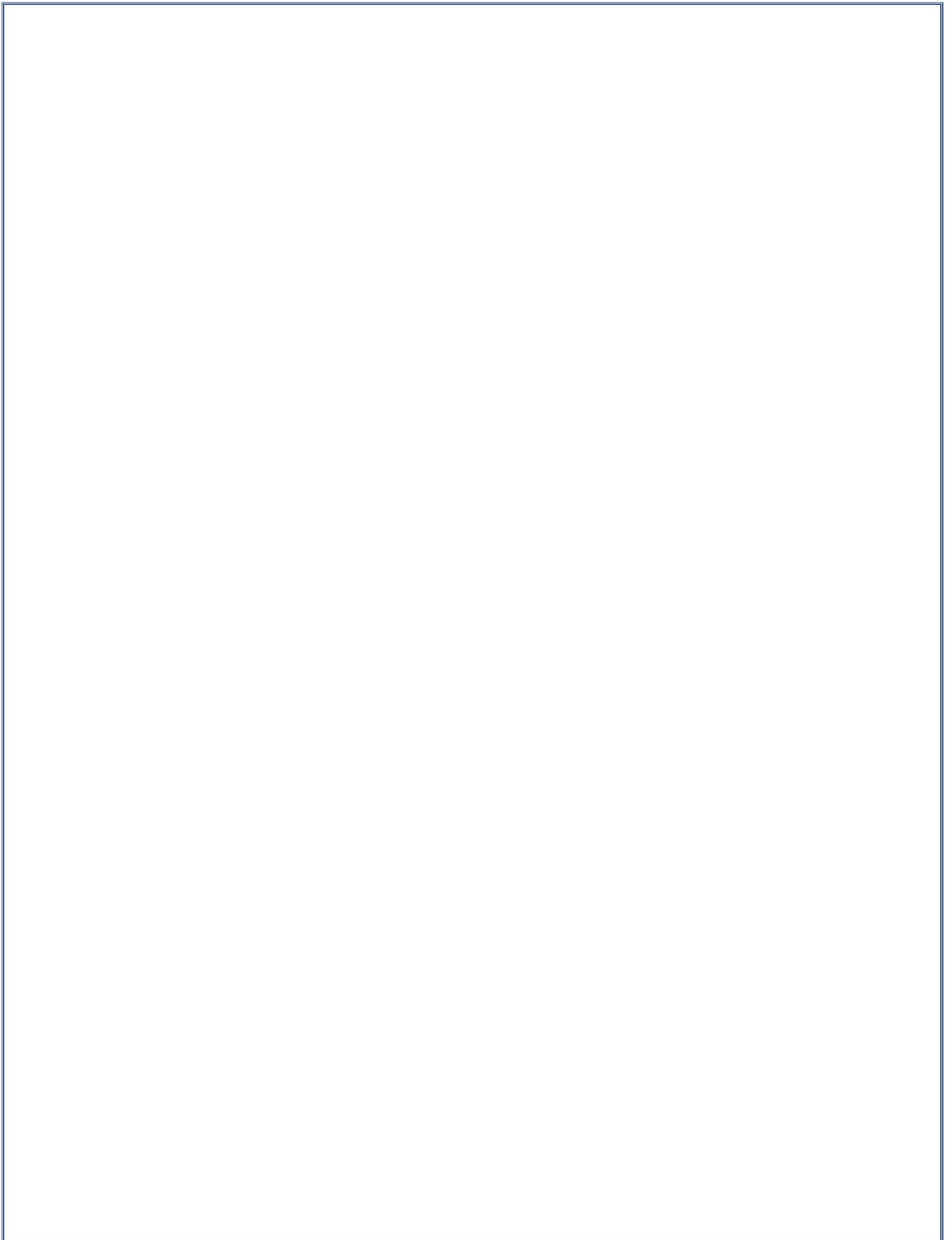
## 2. (Optional) Open the full report

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

## 5. Click SUBMIT

**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 a Report Reminder

## 1. Search for the case

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

2. In the GTS Case screen, click the **Report Reminders** tab

## 3. Create a new reminder

Click the Add Report Reminder icon.

- [Incapacitated Person](#)
- [Case Actions](#)
- [Guardians](#)
- [Other Case Participants](#)
- [Attorneys](#)
- [Reports](#)
- [Bond Ordered](#)
- [Suppressed Flags](#)
- [Report Reminders](#)

## 4. Enter reminder comments

In the Add/Edit Report Reminder screen, click in the **Reminder** field and enter comments related to the case that should be referenced when reviewing future guardian reports.

**Tip** This feature supplements the flags that may appear on Person and Estate reports. These comments serve as a reminder to inspect certain sections of a report that would not otherwise be flagged by GTS.

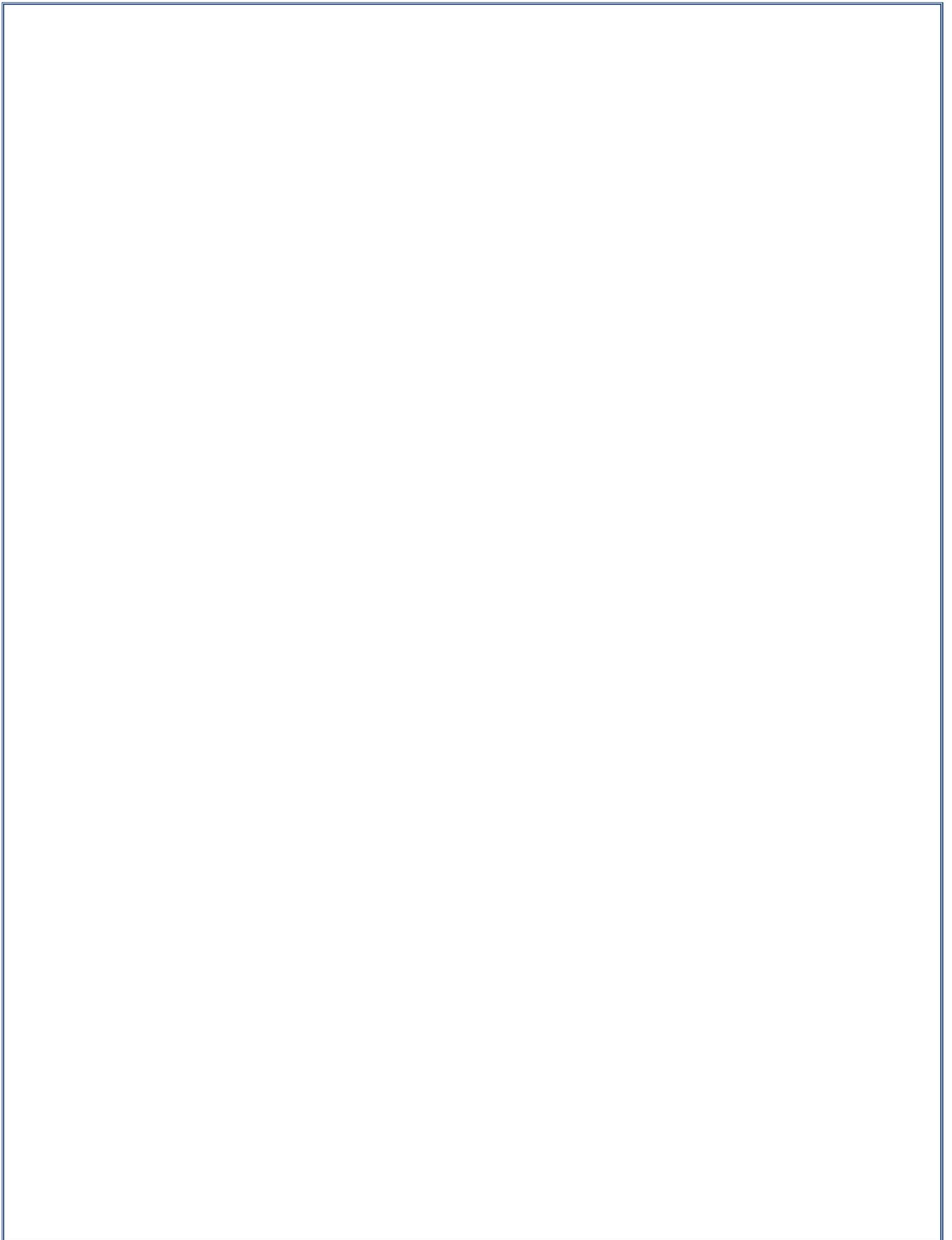
## 5. Choose affected report types

Depending on the subject and relevance of the comments entered in Step 4, select the **Annual Report of the Person** and/or **Annual Report of the Estate** checkboxes.

## 6. (Optional) Define how long the reminder should display

Click in the **Report Period** field and enter the four-digit year that defines the period through which the reminder should display.

## 7. Click SAVE





# 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(s)	File
Annual Report of the Person.pdf	

Flag Details
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' popup with tabs for 'Report Details', 'Status History', and 'Payment'. The 'Report Details' tab is active, showing a table with columns: Case File Number, Incapacitated Person, Report, Guardian(s), and Counselor. A row is visible with Case File Number 'OC-1001-2021', Incapacitated Person 'Hollings, Katheryn', Report 'Annual Report of the Person', and Guardian(s) 'Hollings, Gregory'. Below the table are sections for 'Document(s)' and 'Flag Details'. The 'Flag Details' section shows 'Number of Flags' as '1' and a flag icon with a blue 'F'.

The screenshot shows the 'Flag Review' screen with a table of flags. A blue pen icon is pointing to the 'Edit Flag' icon in the rightmost column of the first row.

Priority	Concern Type	Description	Flagged	on previous report	
Low	Guardian Cited with Protection from Abuse	The guardian was cited with a Protection from Abuse Order or Protection from Sexual Violence Order in the current reporting period.			

## 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	12/15/2022 3:19:13 PM	System Generated

Concern Type: Guardian Cited with Protection from...  
\* Description: The guardian was cited with a Protection from Abuse Order or Protection from Sexual Violence Order in the current reporting period.  
\* Concern Status: Resolved  
\* Comment: A case action for change of guardian has been filed by Peter Nolan.  
Submit

9. Click **SUBMIT**

## 10. Address additional flags

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

## 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.

## 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	Concern Type	Description	Flagged Item	Concern Status
No results found				

Guardian Activity Log: No

# 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

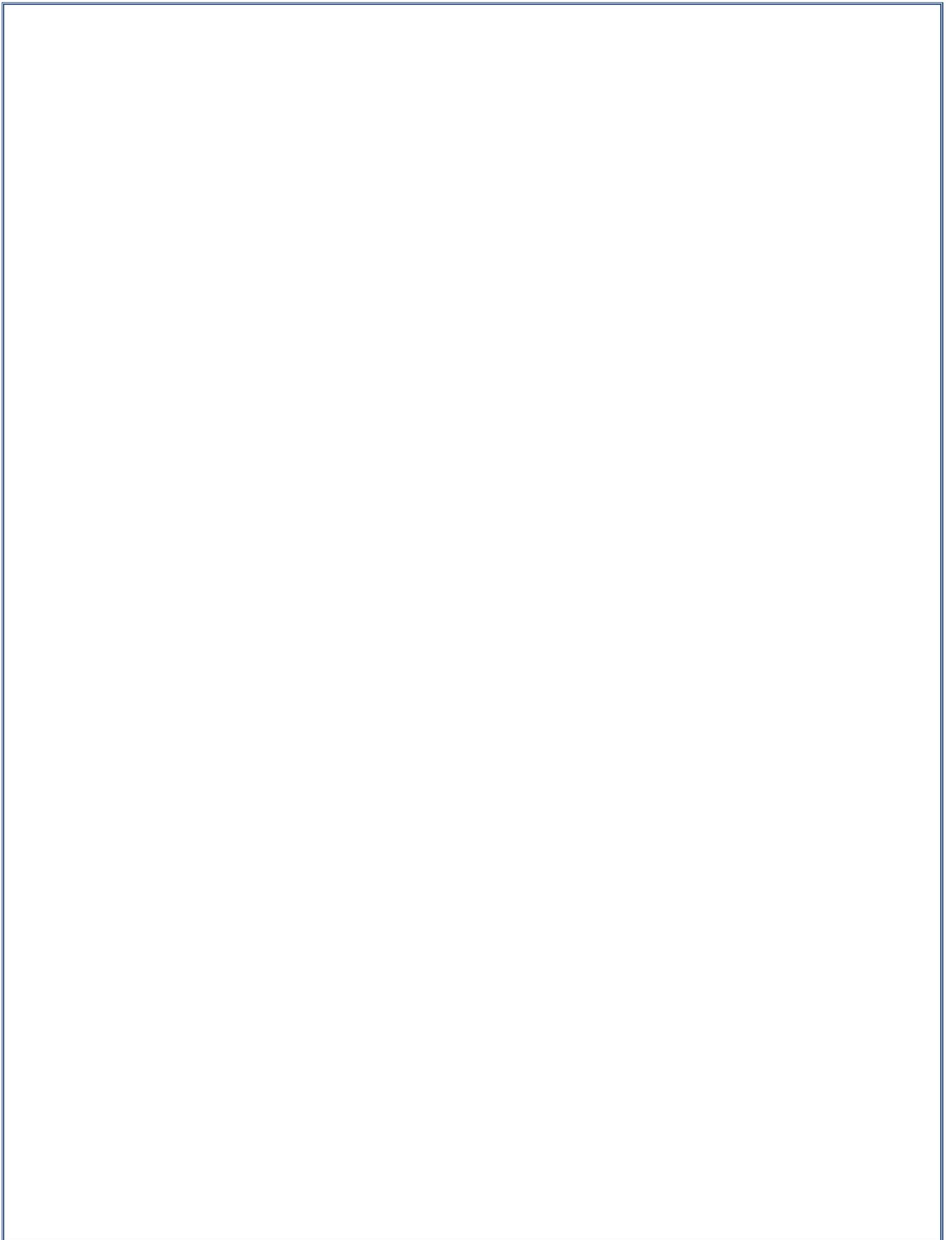
## 15. Add additional manual flags

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.

# Participant Maintenance





# How to Add a Participant to an Existing Case

## 1. Search for the case

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

## 2. Access the Search Participants screen

In the Other Case Participants tab of the GTS Case screen, click the Case Participant Search icon above the Other Case Participants grid.

## 3. Select a participant type

In the Add/Edit Other Case Participant popup, click on the **Search By** dropdown and select the appropriate option for the participant being added to the case.

## 4. Enter the participant's name and any available identifiers

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

## 4. Click SEARCH

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

# How to Add a Participant to an Existing Case



## 5. Choose an existing participant or start creating a new participant record

If the correct participant returns in your results, click the radio button that appears to the left of that individual or organization, click the SELECT button, and proceed to Step 10.

Name	Type	Address	Identifiers	Cases	Alerts
Jessica Goodman	Guardian	992 Redbarn Circle Butler, PA 16001 (Home)	Guardian Num	0	0

If the search returns no results or the participant cannot be conclusively identified from your search results, click the Add Participant icon above the grid and continue to Step 6.

## 7. Enter the participant's address

Use the **Address Type** field to identify the address as a home, business, or mailing address. You must also enter a street **Address**, **City**, **State**, **County**, and **Zip Code**.

If the participant's address is unknown, select the **Address Unknown** checkbox and proceed to the next step.

### Add a Person

Type: Person  
Name Type: [ ]  
Prefix: [ ]  
First Name: Jessica  
Middle Name: [ ]  
Last Name: Goodman  
Generation: [ ]  
Suffix: [ ]  
Title: [ ]  
Address Type: Home  
Location:  International  United States  
Address: 632 Wilderness Drive  
City: Butler  
State: Pennsylvania  
Zip Code: 16001  
County: Butler  
Date of Birth: mm/dd/yyyy  
SSN: [ ]  
Create

### Add an Organization

Type: Organization  
Organization Name: Whitfield Guardians  
Store/Branch: [ ]  
Location:  International  United States  
Address Type: Business  
Address: 325 Main Street  
Suite 3A  
City: Butler  
State: Pennsylvania  
Zip Code: 16001  
County: Butler  
EIN: [ ]  
Create

## 6. Verify the participant's name information

In the Search Participants 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.).

## 8. Click CREATE

# How to Add a Participant to an Existing Case



## 10. Indicate the role of the participant

Select the appropriate Role checkbox that best describes the participant's relationship to the case.

The screenshot shows a web form titled "Add/Edit Other Case Participant". It has a tab labeled "Participant Info". Under the "Roles" section, there are four checkboxes: "Care Facility" (unchecked), "Examiner" (unchecked), "Guardian Ad Litem" (unchecked), and "Interested Party" (checked). Below these are two dropdown menus: "Relationship To Incapacitated Person" (set to "Relative") and "Has Secure Access" (checked). At the bottom of the form is a "Save" button. Black lines with dots at the end point from the text instructions to the "Interested Party" checkbox, the "Relationship To Incapacitated Person" dropdown, and the "Save" button.

## 11. Select the relationship to the incapacitated person (IP) on the case

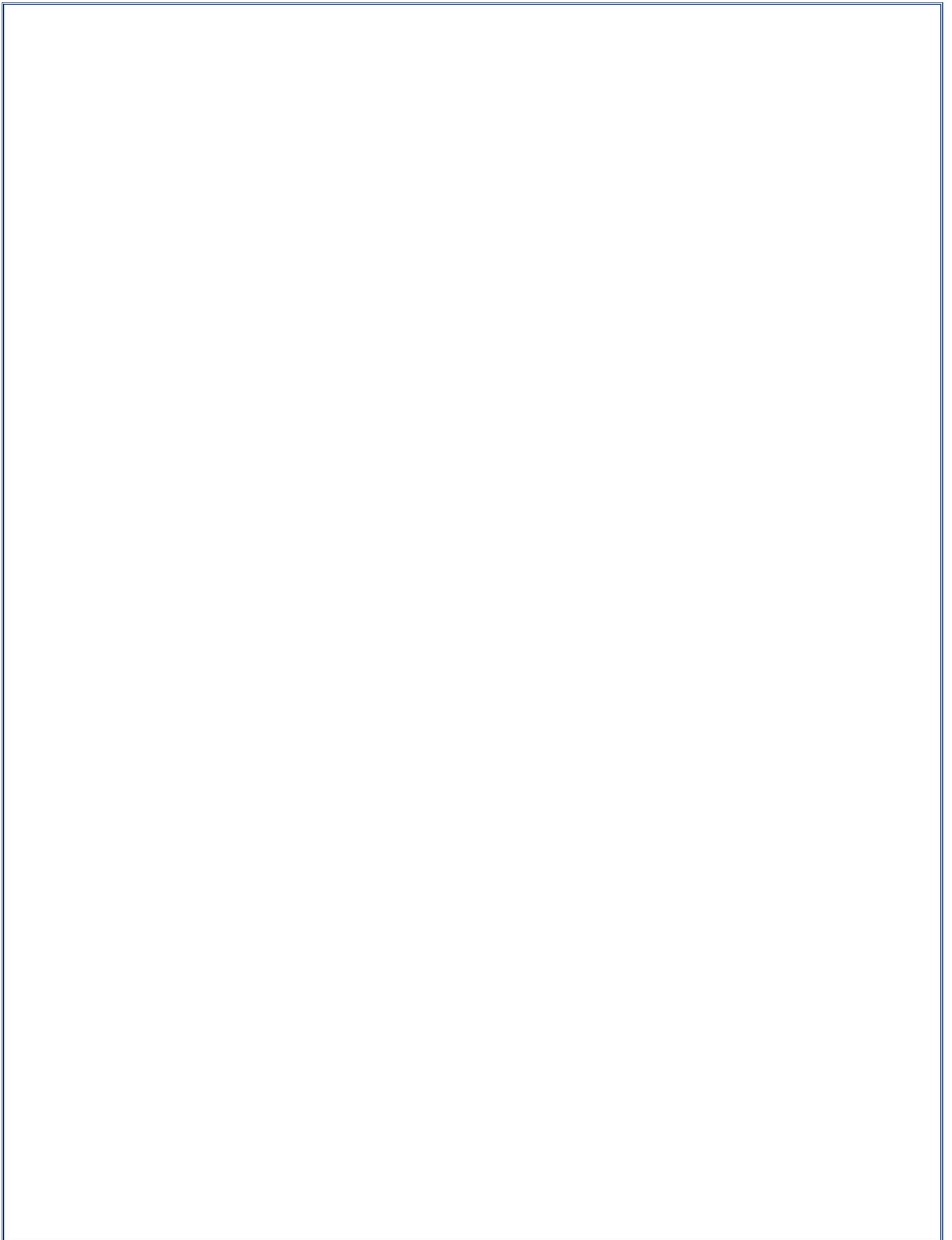
Use the **Relationship to Incapacitated Person** dropdown to select the appropriate value that describes the association.

## 12. Indicate if the participant should have secure access to the case

The participant will need an access code letter. For information on generating an access code, see the *How to Reprint an Access Code Letter* reference guide.

**Tip:** This option allows the participant to view the case and documents through their GTS Dashboard.

## 13. Click SAVE





# How to Add an Attorney to an Existing Case

## 1. Search for the case

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

**Find a Case**

\* Case File No:

[Advanced Search](#)

## 2. Access the Search Attorney screen

In the Attorneys tab of the GTS Case screen, click the Attorney Search icon above the Attorneys grid.

<a href="#">Incapacitated Person</a> <a href="#">Case Actions</a> <a href="#">Guardians</a> <a href="#">Other Case Participants</a> <a href="#">Attorneys</a> <a href="#">Reports</a> <a href="#">Bond Ordered</a>	<p><b>Attorneys</b></p> <table border="1"> <thead> <tr> <th>Name</th> <th>Address</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> </tr> </tbody> </table> <p style="text-align: right;">+</p>	Name	Address		
Name	Address				

## 3. Enter the attorney's name

Enter the attorney's **Last Name** and **First Name**.

**Tip:** If known, using the attorney's **PA Bar Number** is the quickest way to find their record.

**Search Attorney**

Search By:

\* Last Name:

First Name:

SSN:

Birth Date:

Attorneys Only:

Attorney Type:

PA Bar Number:

## 4. Click SEARCH

## 5. Choose the attorney

Click the radio button that appears to the left of the attorney and click the **SELECT** button.

	Name	Type	Address	Identifiers	Birth	Active Cases	Alerts
<input type="radio"/>	Rosemary	Attorney	153 Meadow Dr Beaver Falls, PA 150101651 (Mailing)	PA Bar Number: 078387 (Active)		0	0
<input checked="" type="radio"/>	Martin Nolan						

# How to Add an Attorney to an Existing Case



## 5. Select the represented party

In the Add/Edit Attorney Details popup, click the **Representing** dropdown and select the appropriate participant.

Add/Edit Attorney Details	
Attorney Info	Attorney Info
Attorney Name:	Nolan, Rosemary Martin
PA Bar Number:	078387
Attorney Type:	Bar Member
Representing:	Fuller, Ashley (Incapacitated Person)
Appointed By Court:	<input checked="" type="checkbox"/>
Appointment Date:	11/20/2022
Paid by County:	<input checked="" type="checkbox"/>
Save	

## 7. Click SAVE

## 6. (Optional) Record the appointment details

Complete one or more of the following:

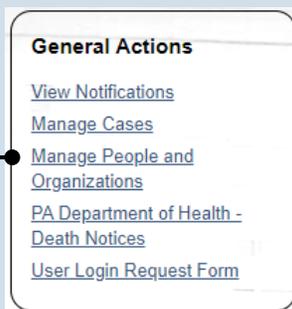
- If the attorney was appointed by the court to represent a party on the case, click the **Appointed By Court** checkbox and record the **Appointment Date**.
- Select the **Paid by County** checkbox if the attorney receives payment from the county for their legal services.



# How to Add Training and Certification for a Guardian

## 1. Initiate a search

In the General Actions section of your Dashboard, click the *Manage People and Organizations* link.



### Participant Search

Search By: Person ?

Last Name:

First Name:

SSN:

Birth Date:

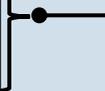
Death Date:

Guardians Only:  (One or more of these fields is required)

Attorneys Only:

## 2. Enter the search criteria for the person

On the Participant Search screen, click on the **Search By** dropdown and select 'Person'. Enter the guardian's **Last Name** and **First Name**.



## 3. Click SEARCH

**Tip** If the person is not found, repeat Step 2 using different information for the search.



**Tip** Partial names, with a minimum of two characters, can be used.

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

Name	Type	Address	Identifiers	Per Info
Donna M. Hunter	Guardian	141 Courtney Dr Verona, PA 15147 (Other)	Guardian Number: 1200301	

## 4. Choose the guardian

Based on the search results, click the Edit Record icon that appears to the right of the appropriate guardian.



# How to Add Training and Certification for a Guardian



5. In the Edit Person/Organization screen, click on the Guardian Details tab

Names
Addresses
Phone
Email
Attributes
<b>Guardian Details</b>
Attorney Details
Alerts
Audit Information

7. Insert a new certification row  
Click the Add Certification Record icon above the Certifications grid.

Certification Type / Provider Name	Effective Date	Expiration Date	
<input type="text"/>	mm/dd/yyyy	mm/dd/yyyy	  

6. Are you adding a certification?

To add a certification for a guardian, continue to Step 7. Otherwise, proceed to Step 10.

9. Click the Save icon  
The certification is saved to the guardian's person record.

Certification Type / Provider Name	Effective Date	Expiration Date	
Family/Lay Guardian Training: Fundamentals of G	11/01/2022	10/31/2024	 

8. Record the certification details

Select the **Certification Type/Provider Name** from the dropdown and enter the **Effective Date** and **Expiration Date** of that certification.

11. Insert a new training row  
Click the Add Training Record icon above the Trainings grid.

Course Name	Provider Name	Start Date	End Date	
No results found				

10. Are you adding training?

To add trainings for a guardian, continue to Step 11. Otherwise, this process is complete.

# How to Add Training and Certification for a Guardian



**12. Enter the name of the training in the Course Name field**

Course Name	Provider Name	Start Date	End Date	
Caring for Someone with Alz	National Guardianship As	09/30/2022	09/30/2022	Save Delete

**14. Enter the training dates**

Enter the **Start Date** of the training. Entering the **End Date** is optional.

**13. Enter the provider**

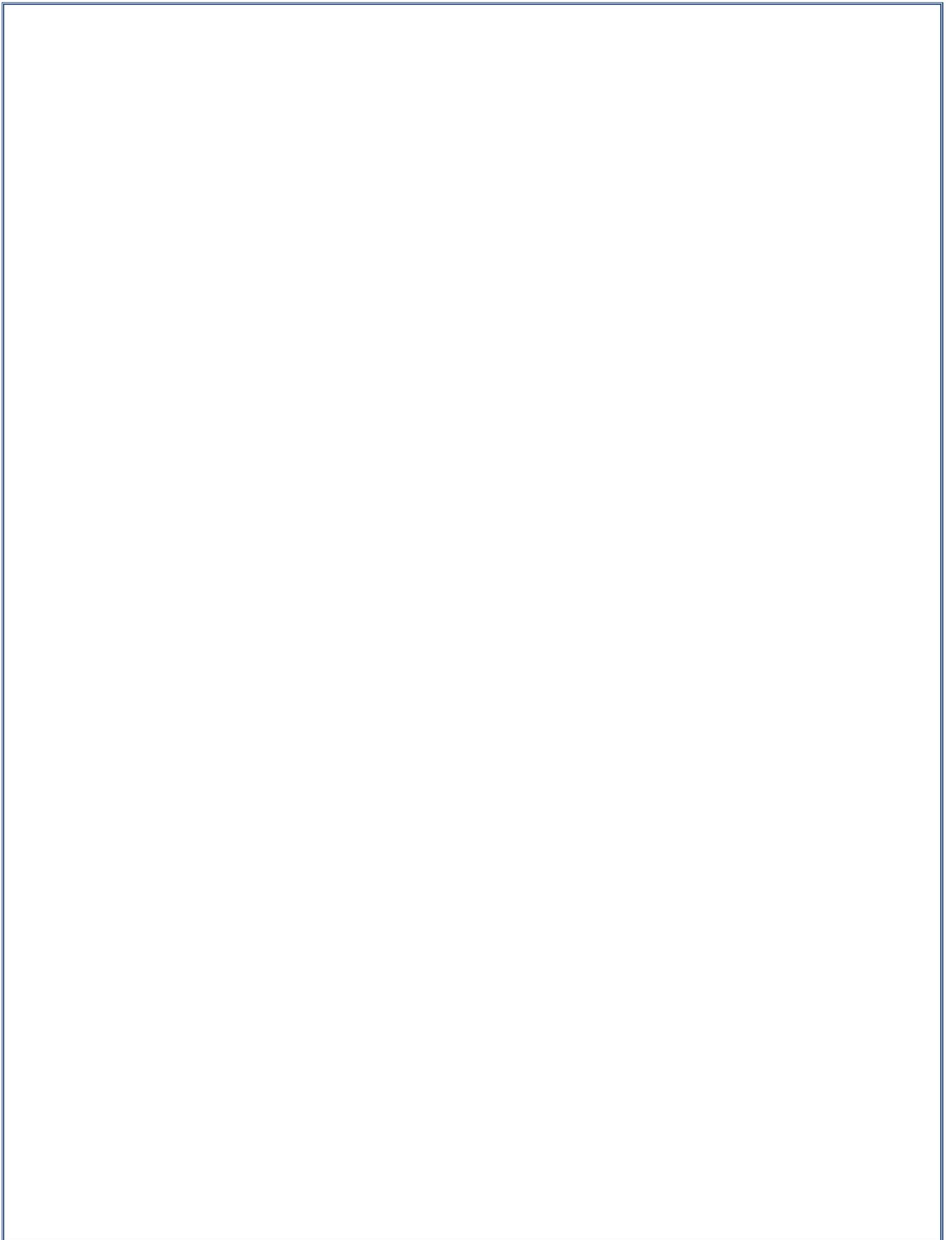
Enter the name of the individual, organization, or institution that offered the training in the **Provider Name** field.

**15. Click the Save icon**

The training is saved to the guardian's person record.

**16. Enter additional training**

Repeat Steps 11 – 15 for additional trainings.





# Add a Participant Alert (Abuse, Neglect, Financial Exploitation)

## 1. Initiate a search

In the General Actions section of your Dashboard, click the *Manage People and Organizations* link.

**General Actions**

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

## 2. Enter the name of the guardian

In the Participant Search screen, select 'Person' or 'Organization' from the **Search By** field and enter the participant's **Last Name** and **First Name** or **Organization Name** and/or **EIN**.

**Tip:** Partial names, with a minimum of two characters, can be used.

## 3. Limit your search

Select the **Guardians Only** checkbox.

With this action, the **Professional Guardians Only** checkbox is selected automatically. If you do not want to search for professional guardians, deselect this checkbox.

Search by Person

**Add/Edit Case Participant** X

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 required)

Guardian Number: ?

Works in County: ?

Professional Guardians Only:  ?

Attorneys Only:

**Search**

## 4. Click SEARCH

Search by Organization

**Add/Edit Case Participant** X

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**

## 5. Choose a guardian

Based on the search results that display, click the Edit Record icon that appears to the right of the appropriate guardian.

Name	Type	Address	Identifiers	Active Cases	Other Info	
<input checked="" type="radio"/> Cameron Boggs	Guardian	341 Lincoln Ave. Sandy Ridge, PA 16677 (Home)	Guardian Number: 1200302	2		

**Select**

# Add a Participant Alert

(Abuse, Neglect, Financial Exploitation)



6. In the Edit Person / Organization screen, click the Alerts tab

Participant Information	
Name	Address
Boggs, Cameron	341 Lincoln A Sandy Ridge (Home)

Participant Alerts	
Alert Type	Descri

7. Initiate the alert  
Click the Add New Alert icon.

8. Add the Alert Type  
In the Alert Management popup, click on the **Alert Type** dropdown and select the option that best describes the reason for creating the alert.

**Tip** This action defaults the **Description** automatically following Step 13.

Alert Management

\* Alert Type: Financial Exploitation

Description:

\* Court Authority: Bigham, Robert G.

\* Alert Status: Active

\* Status Date: 11/22/2022

\* Should Guardian Be Notified: No

Save

9. Add a Court Authority  
Click on the **Court Authority** dropdown and select the judge or other authority that directed the creation of the guardian alert.

10. Verify the Alert Status  
Verify that the **Alert Status** defaults to 'Active.'

11. Verify the Status Date  
The **Status Date** field automatically defaults to the current date. This date can be updated if needed.

12. Specify guardian notification  
Click on the **Should Guardian Be Notified** dropdown and select the correct option.

**Tip** Selecting 'Yes' sends a GTS notification to the guardian.

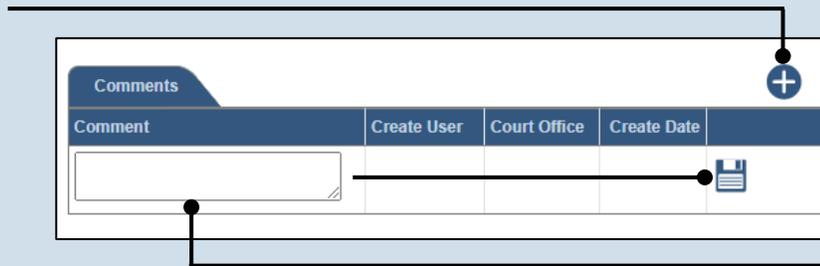
13. Click SAVE

# Add a Participant Alert (Abuse, Neglect, Financial Exploitation)



## 14. Add new comment record

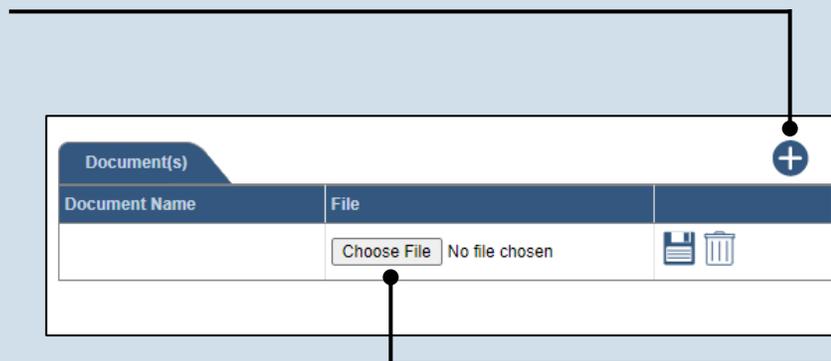
Click the Add Comment icon above the Comments grid.



**15. Add comments**  
Enter any relevant information or reasons for creating the alert and click the Save icon.

## 16. (Optional) Documents

If documents are available that corroborate the reason for the alert, and you want to make them available through GTS, click the Add Document icon and continue to Step 17.



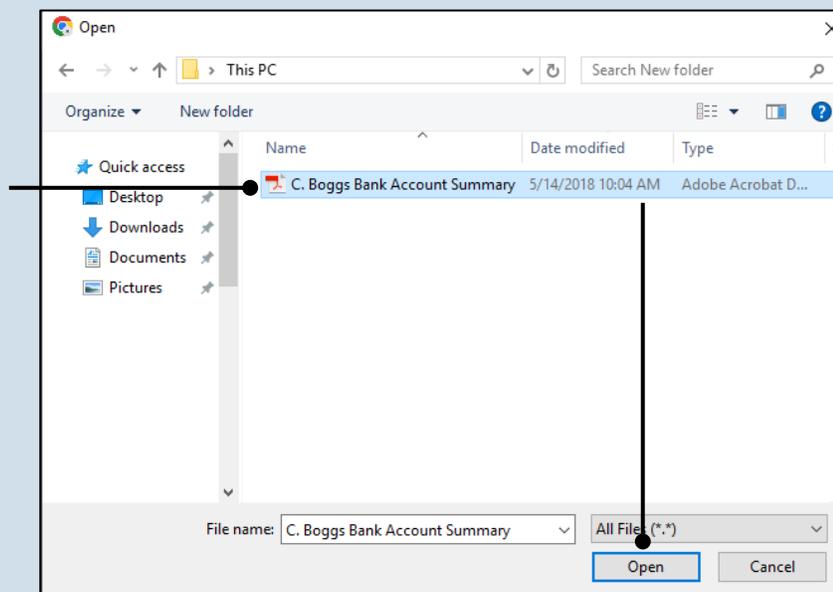
**17. (Optional) Click the CHOOSE FILE button**

Otherwise, proceed to Step 19.

## 18. (Optional) Documents (cont.)

In the popup screen that appears, locate the PDF version of the document you have saved on your computer or a movable storage device. Select the file and click OPEN.

**Tip** GTS only accepts documents in a PDF format. 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 Participant Alert (Abuse, Neglect, Financial Exploitation)



## 19. Close the alert

Click the 'X' in the upper-right of the Alert Management popup.

**Tip** If the guardian files electronically through GTS, and they were designated to receive notice in Step 12, they will receive a notification that lets them know an alert has been entered against them. The same is true if/when the alert is resolved.

**Tip** Once saved, the alert will be viewable to other Orphans' Court offices through participant searches or if they attempt to add the guardian to a case.

**Tip** Alerts cannot be deleted and can only be resolved by the court that created the alert. Other courts, however, are permitted to add comments.

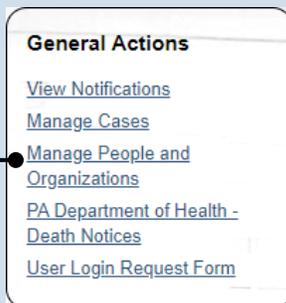
Alert Management					
* Alert Type:	Financial Exploitation				
Description:					
* Court Authority:	Bigham, Robert G.				
* Alert Status:	Active				
* Status Date:	11/22/2022				
* Should Guardian Be Notified:	No				
Alert History					
Status	Status Date	Create User	Court Office	Create Date	
Active	11/22/2022	aopc_admin56	Adams County Orphans' Court	11/22/2022	
Comments					
Comment	Create User	Court Office	Create Date		
Document(s)					
Document Name	File				
No results found					



# How to Add a Fee Waiver for a Guardian

## 1. Initiate a search

In the General Actions section of your Dashboard, click the *Manage People and Organizations* link.



## 2. Enter the name of the guardian

In the Participant Search screen, select 'Person' or 'Organization' from the **Search By** field and enter the participant's **Last Name** and **First Name** or **Organization Name** and/or **EIN**.

## 3. Limit your search

Select the **Guardians Only** checkbox.

With this action, the **Professional Guardians Only** checkbox is selected automatically. If you do not want to search for professional guardians, deselect this checkbox.

### Search by Person

#### Participant Search

Search By: Person ?

Last Name:  (Optional)

First Name:

SSN:  ?

Birth Date:  ?

Death Date:  ?

Guardians Only:  (One or more of these fields is required)

Guardian Number:  ?

Works in County: --- ?

Professional Guardians Only:  ?

Attorneys Only:  ?

### Search by Organization

#### Participant Search

Search By: Organization ?

Organization Name:  (Optional)

EIN:  (Optional)

Guardians Only:  (One or more of these fields is required)

Guardian Number:  ?

Works in County: --- ?

Professional Guardians Only:  ?

## 4. Click SEARCH

# How to Add a Fee Waiver for a Guardian



## 5. Choose a guardian

Based on the search results that display, click the Edit Record icon that appears to the right of the appropriate guardian.

Name	Type	Address	Identifiers	Dashboard Info
Cameron Boggs	Guardian	341 Lincoln Ave. Sandy Ridge, PA 16677 (Home)	Guardian Number: 1200302	

- [Names](#)
- [Addresses](#)
- [Phone](#)
- [Email](#)
- [Attributes](#)
- [Guardian Details](#)
- [Attorney Details](#)
- [Alerts](#)
- [Audit Information](#)

6. In the Edit Person / Organization screen, click the Guardian Details tab

## 7. Apply the waiver

Select the **Filing Fee Waiver** checkbox.

**Tip** Selecting this checkbox allows the guardian to submit reports to the court without paying any filing fees.

Organization

Address	Email	Phone Number
341 Lincoln Ave. Sandy Ridge, PA 16677 (Home)		

Is Guardian:  ?

Guardian Number:

Is Professional Guardian:

Filing Fee Waiver:

8. Click **SAVE**



# Add or Update the IFP Status of an Incapacitated Person

## 1. Search for the case

On your Dashboard, click in the **Case File No** field, enter the number for the case where you need to update the participant, and press *[Enter]* on your keyboard.

**Find a Case**

\* Case File No:

[Advanced Search](#)

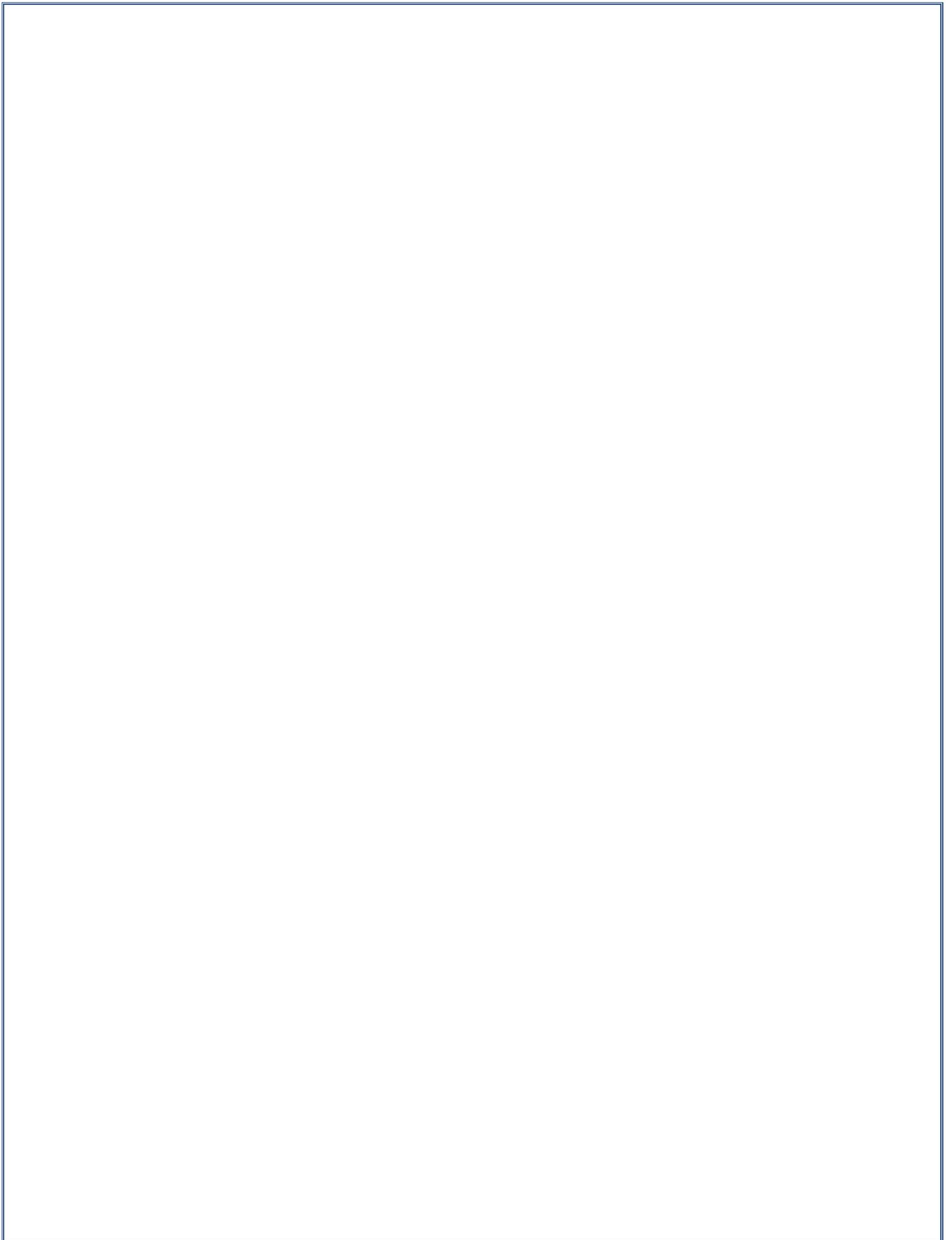
Person Info				
Age At Petition	Current Age	Date of Death	IFP Status	
64	70	yyyy	Petition Granted	

## 2. Add or update the IFP status

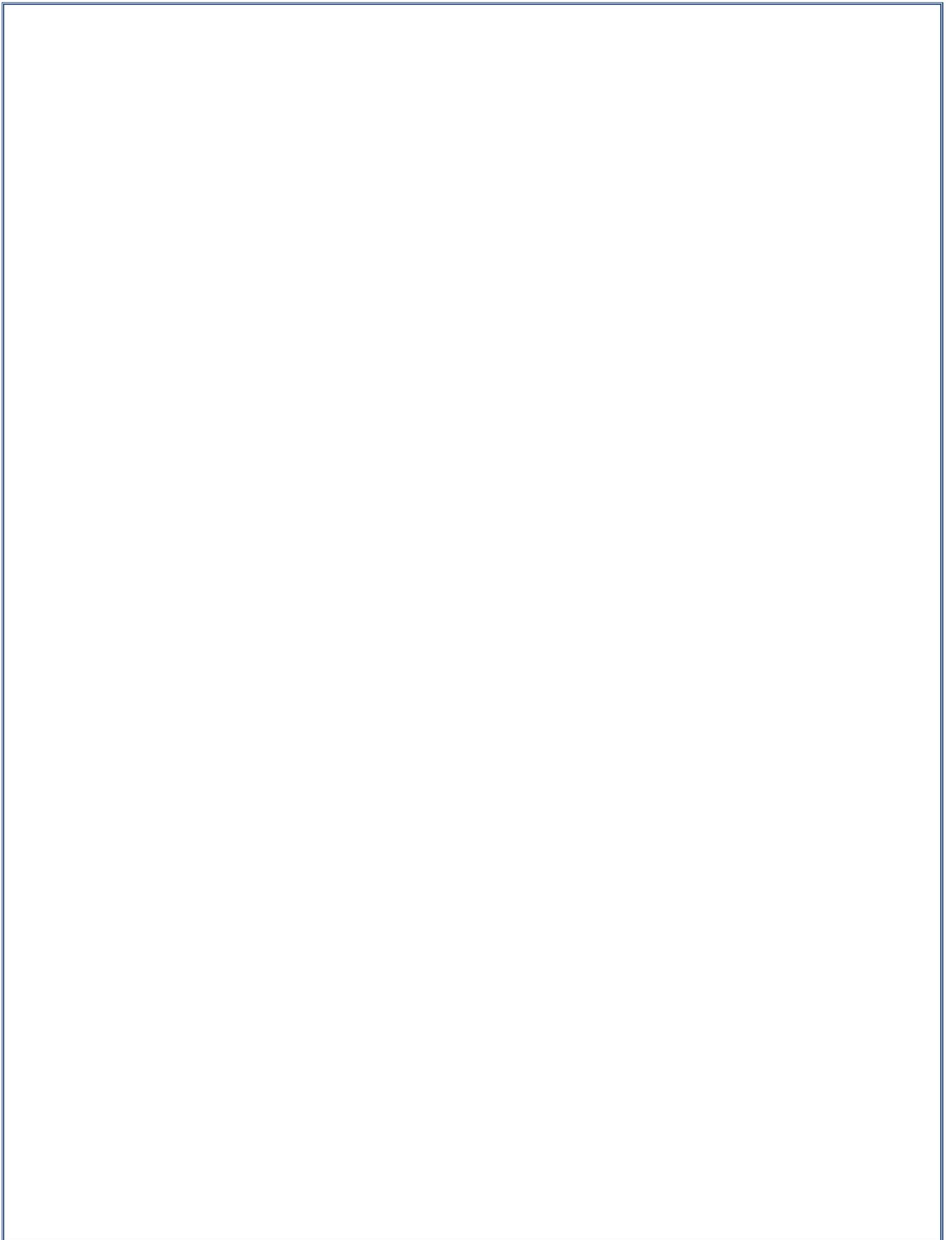
In the GTS Case screen, select the new **IFP Status** from the dropdown field in the Person Info tab.

## 3. Click SAVE





Miscellaneous





# 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. <b>PA Department of Health – Death Notices</b> – Search for the Pennsylvania Department of Health death certificates for individuals.</p> <p>11. <b>User Login Request Form</b> – 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. <b>View All Reports</b> – 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. <b>View Adhoc Reports</b> – Provides access to a number of GTS management reports.</p> <p>14. <b>Act 24 Report</b> – 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. <b>Recent News</b> – 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> |
|--|---|



# How to Add a Bond

## 1. Search for the case

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:

Search

[Advanced Search](#)

- [Incapacitated Person](#)
- [Case Actions](#)
- [Guardians](#)
- [Other Case Participants](#)
- [Attorneys](#)
- [Reports](#)
- [Bond Ordered](#)
- [Suppressed Flags](#)
- [Report Reminders](#)

2. On the GTS Case screen, click the **Bond Ordered** tab

## 3. Specify that bond has not been waived

Click on the **Bond Waived** dropdown and select 'No'.

**Tip:** Bond information cannot be added if 'Yes' is selected, which denotes the bond is waived.

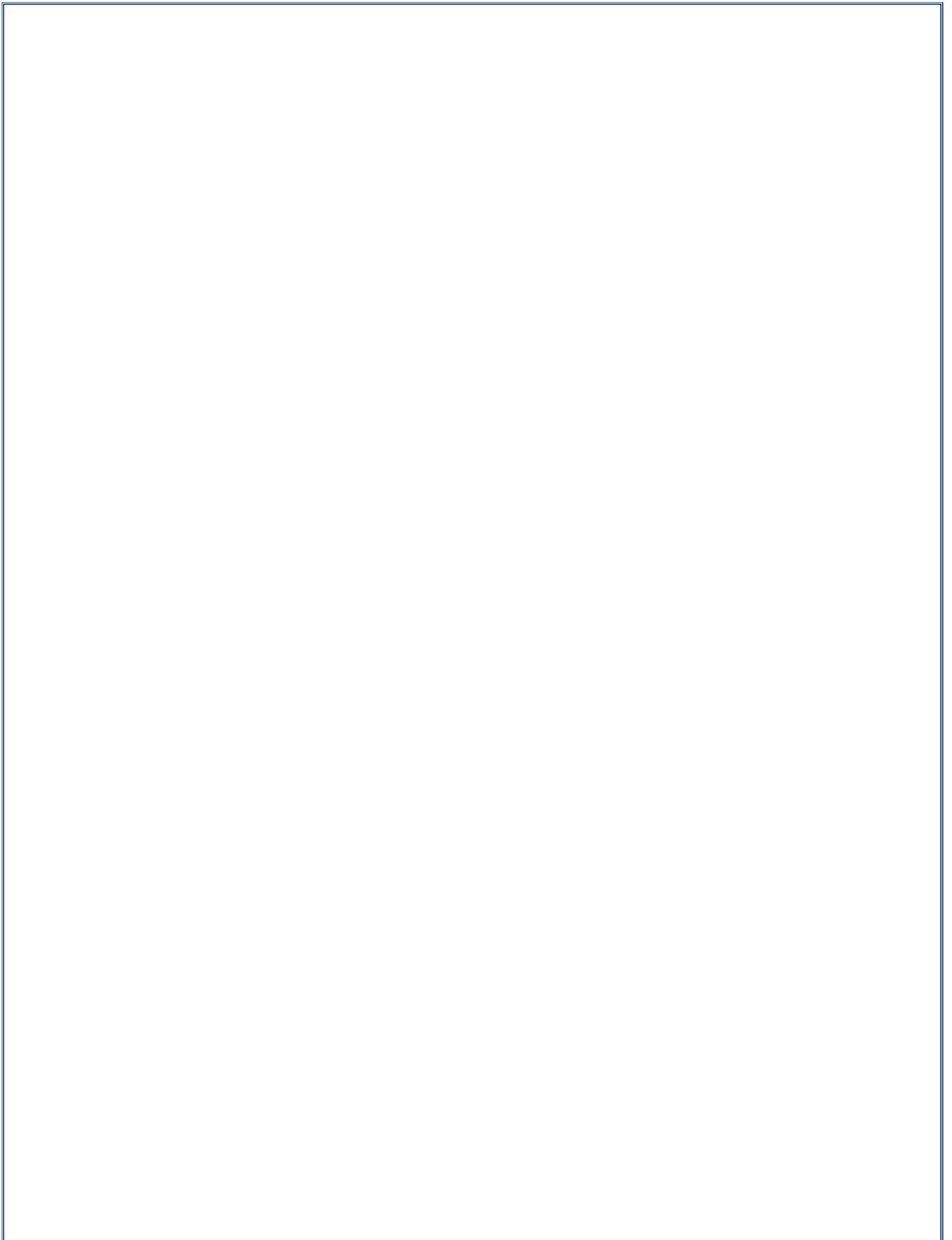
Bond Ordered			
Is Bond Waived	Bond Ordered Amount	Bond Ordered Date	
No	60000	09/19/2022	

4. Enter the **Bond Ordered Amount**  
Click in the **Bond Ordered Amount** field and enter the amount ordered in the decree.

## 5. Enter the Bond Ordered Date

The **Bond Ordered Date** field should automatically default to the adjudication date. This date can be updated if needed.

6. Click the **Save** icon





# How to Post a Bond

## 1. Search for the case

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:

[Advanced Search](#)

[Incapacitated Person](#)

[Case Actions](#)

[Guardians](#)

[Other Case Participants](#)

[Attorneys](#)

[Reports](#)

[Bond Ordered](#)

[Suppressed Flags](#)

2. In the GTS Case screen, click the **Bond Ordered** tab

## 3. Initiate a bond posting

Click the Add Post Bond icon above the Bond Posted grid.

Bond Ordered	
Is Bond Waived	Bond Ordered Date
<input type="text" value="No"/>	<input type="text" value="09/19/2022"/> <input type="button" value="📅"/>
Bond Posted	
Bond Number	Expiration Date
<input type="text"/>	<input type="text"/>

4. Select a bond carrier or initiate a search

In the Add/Edit Post Bonds screen, click on the **Carrier Type** dropdown and complete one of the following:

Add/Edit Post Bonds
✕

Carrier Type:

\* Search Carrier:

Bond No:

\* Bond Amount:

\* Effective Date:

\* Expiration Date:

- If the bond carrier is 'In State', continue to Step 5.
- If the bond carrier is 'Out of State', proceed to Step 8.

# How to Post a Bond



## 5. Enter bond carrier's name

Click in the **Search Carrier** field and enter the name of the bond carrier.

**Tip** If you are uncertain of the carrier's full name, partial name searches are allowed, but you must enter at least three characters.

## 6. Click SEARCH

## 7. Select the bond carrier

Select the radio button that appears to the left of the appropriate bond carrier. Proceed to Step 9.

## 8. Enter bond carrier's name

Click in the **Carrier Name** field and enter the name of the bond carrier.

# How to Post a Bond



## 9. (Optional) Enter the bond number

Click in the **Bond No** field and enter the unique number associated to the bond.

## 10. Enter the bond amount

Click in the **Bond Amount** field and enter the amount that was obtained for the bond.

## 11. Enter the bond's effective date

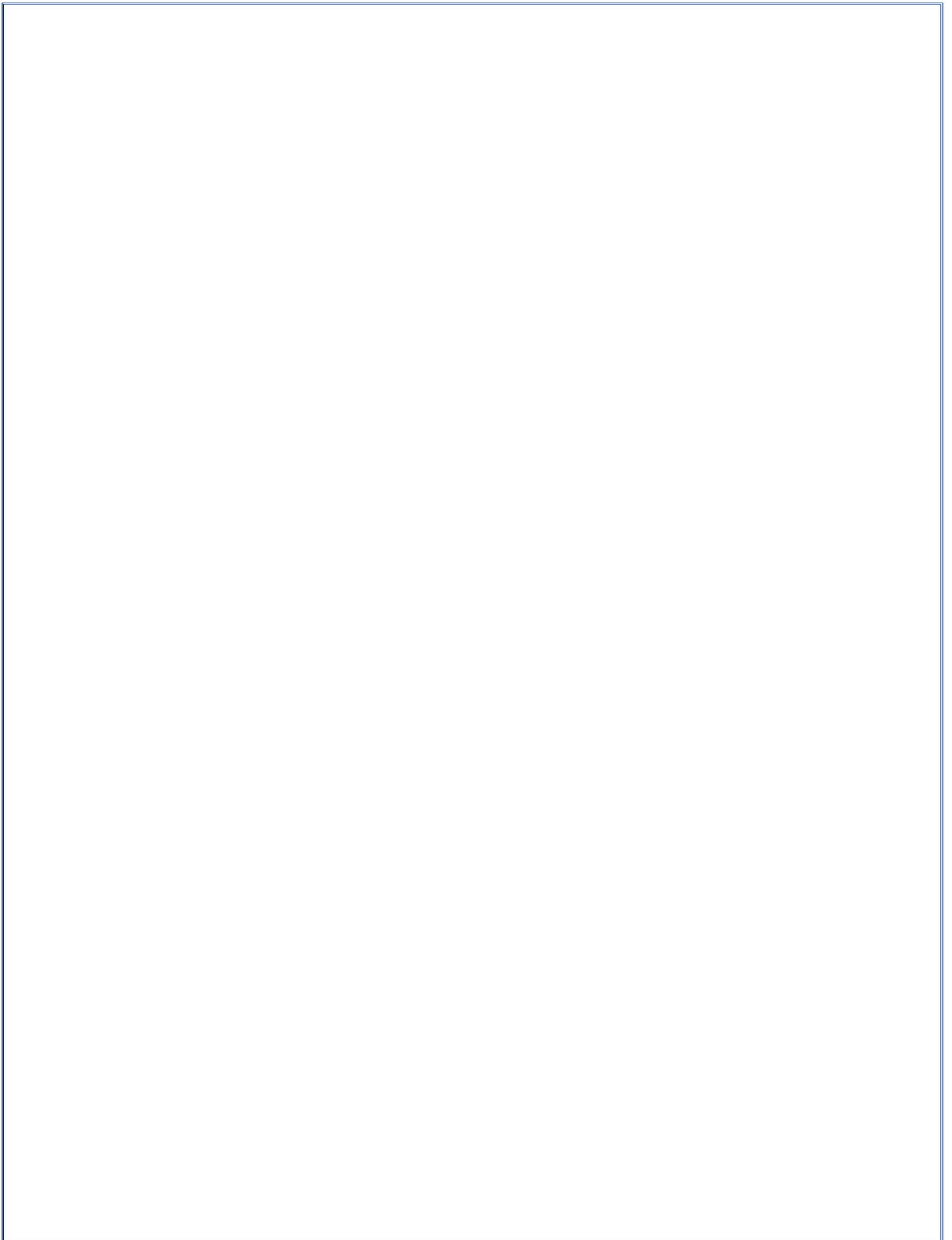
## 12. Enter the bond's expiration date

## 13. Click SAVE

The screenshot shows a web form titled "Add/Edit Post Bonds" with the following fields and annotations:

- Carrier Type:** In State (dropdown menu)
- \* Search Carrier:** Penn National (text input)
- Search** (button)
- Carrier Selection Table:**

Carrier Name	License Number
<input checked="" type="radio"/> Penn National Security Insurance Company	32441
- Bond No:** SB 9995847 (text input, annotated with step 9)
- \* Bond Amount:** 60000 (text input, annotated with step 10)
- \* Effective Date:** 09/19/2022 (calendar icon, annotated with step 11)
- \* Expiration Date:** 09/19/2023 (calendar icon, annotated with step 12)
- Save** and **Clear** (buttons, annotated with step 13)





# How to Generate a Mental Health Commitment Form

➤ This reference guide assumes that the person has been adjudicated as incapacitated

## 1. Search for the case

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

**Find a Case**

\* Case File No:

[Advanced Search](#)

Incapacitated Person	Case Actions			Documents	
Case Actions	Action Date/Time	Case Action			
Guardians	08/02/2021 09:49 AM	Petition for Adjudication of			
Other Case Participants	08/17/2021 09:53 AM	Final Decree - Adjudication			
Attorneys					
Reports					

## 2. Access the Mental Health Commitment Form Data screen

In the Case Actions tab of the GTS Case screen, click the Print MH Commitment icon above the Case Actions grid.

## 3. Complete the information for the form

In the Mental Health Commitment Form Data popup, some fields are populated from the case details and participant record. Complete any remaining fields as needed.

**Mental Health Commitment Form Data**

Adjudication Date:

Last Name:

First Name:

Middle Name:

Generation:

Maiden Name:

Alias:

Date Of Birth:

SSN:

Sex:

Race:

Height Feet:

Height Inches:

Weight:

Hair:

Eyes:

Address:

Judicial Authority:

## 4. Click SAVE

# How to Generate a Mental Health Commitment Form



## 5. View the letter

A new case action is added to the case. Click on the Document icon for the Notification of Mental Health Commitment Generated case action to open the form as a PDF document which can be printed.

Case Actions			+	🖨️
Action Date/Time	Case Action	Documents		
08/02/2021 09:49 AM	Petition for Adjudication of Incapacity and Appointment of Guardian	3	📄	🔍
08/17/2021 09:53 AM	Final Decree - Adjudication of Incapacity/Appointment of Guardian	1	📄	🔍
11/30/2022 10:52 AM	Notification of Mental Health Commitment Generated	1	📄	🔍

## 7. Return to the Web Portal

Close the tab displaying the PDF document to return to the Web Portal so you can continue.

COMMONWEALTH OF PENNSYLVANIA  
**NOTIFICATION OF MENTAL HEALTH COMMITMENT**

In accordance with 18 Pa. C.S. 6111.1(f)(1)(i), judges of the courts of common pleas shall notify the Pennsylvania State Police of the identity of any individual who has been adjudicated as an incompetent or as a mental defective or who has been in a mental institution under the act of July 9, 1976 (P.L. 817, No. 143) known as the Mental Health Procedures Act, or who is treated as described in section 6105(c)(4) (relating to persons not to possess, use, manufacture, control, sell or transfer, or described in 18 U.S.C. §922(g)(4) (relating to unlawful acts) and its implementing Federal regulations. This notification shall be transmitted to the PSP within SEVEN days of the adjudication, commitment, or treatment, at the address below.

The Pennsylvania Uniform Firearms Act, 18 Pa.C.S. §6105(c)(4) specifies that it shall be unlawful for any person who is incompetent or who has been involuntarily committed to a mental institution for inpatient care and treatment under the act of July 9, 1976 (P.L. 817, No. 143) to possess, use, manufacture, control, sell or transfer, or would include adjudication of incapacity pursuant to 20 Pa.C.S.A. §5501. Pursuant to the Pennsylvania Mental Health Procedures Act, notification shall be transmitted to the Pennsylvania State Police by the judge, MH review officer or county MH/MR at the address of the adjudication, commitment or treatment by first class mail to the Pennsylvania State Police, Attention: Pennsylvania State Police, P Avenue, Harrisburg, PA 17110. A copy of this form must also be forwarded to the sheriff of the county in which the individual resides in accordance with 18 Pa.C.S. §6109(i.1)(2). The envelope should be marked "CONFIDENTIAL - ATTENTION FIREARMS."

**INVOLUNTARY COMMITMENT**

302  303  304  ADJUDICATED INCAPACITATED / INCOMPETENT  OTHER: \_\_\_\_\_

DATE OF COMMITMENT OR ADJUDICATED INCAPACITATED, ETC: 08/17/2021

COUNTY OF COMMITMENT OR ADJUDICATION: BUTLER

## 6. Print the letter

The report opens in a new tab. Use the Print icon in the toolbar to print the document.

**Tip:** Depending on your browser settings, the PDF may open in a new window instead.

**Tip:** Depending on your browser and settings, you may need to close the window displaying the document instead of a tab.

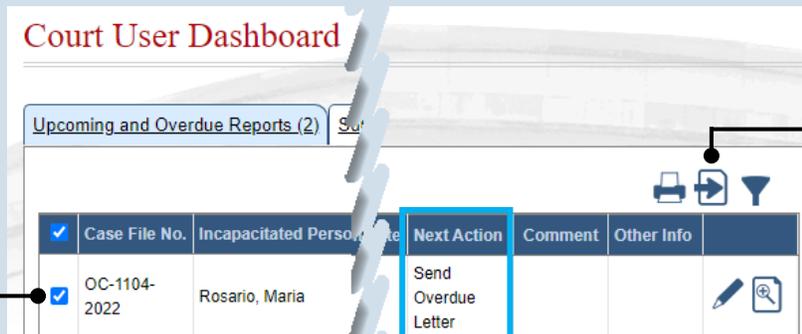


# How to Generate an Overdue Notice

## 1. Select the overdue cases

In the Upcoming and Overdue Reports tab of your Dashboard, select the checkbox for any applicable case with a **Next Action** of 'Send Overdue Letter.'

**Tip** Use the Filter icon  to limit the cases that display by the length of time they are overdue (Report Due Ranges).

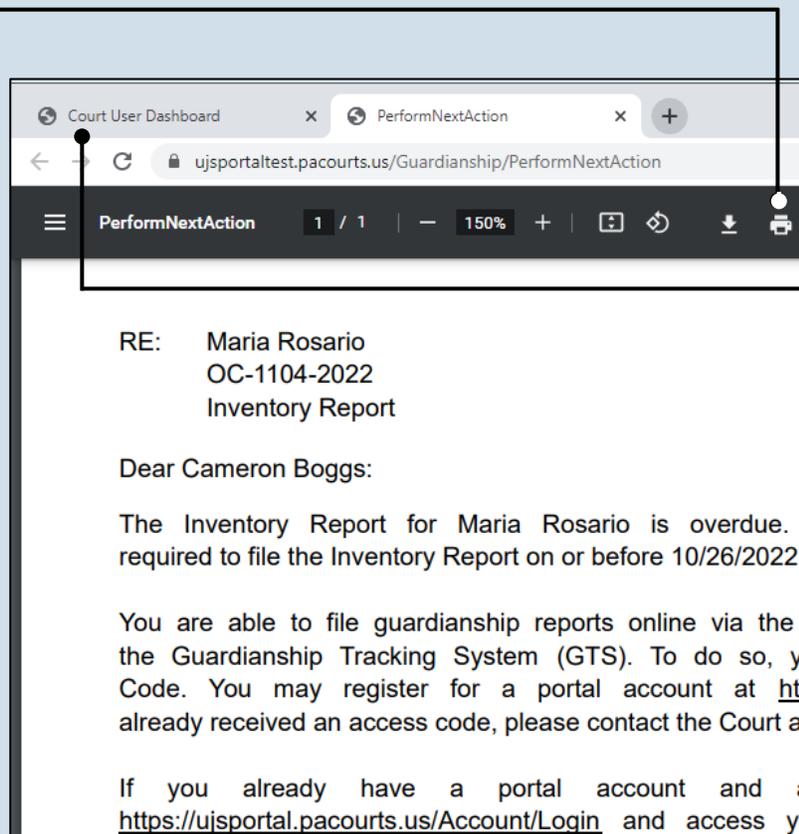


## 2. Click the Perform Next Action icon

**Tip** After performing this action, the letter(s) likely opens as a PDF in a separate browser tab. If you generated letters for multiple cases, they will be combined into a single PDF.

## 3. Print the overdue letter

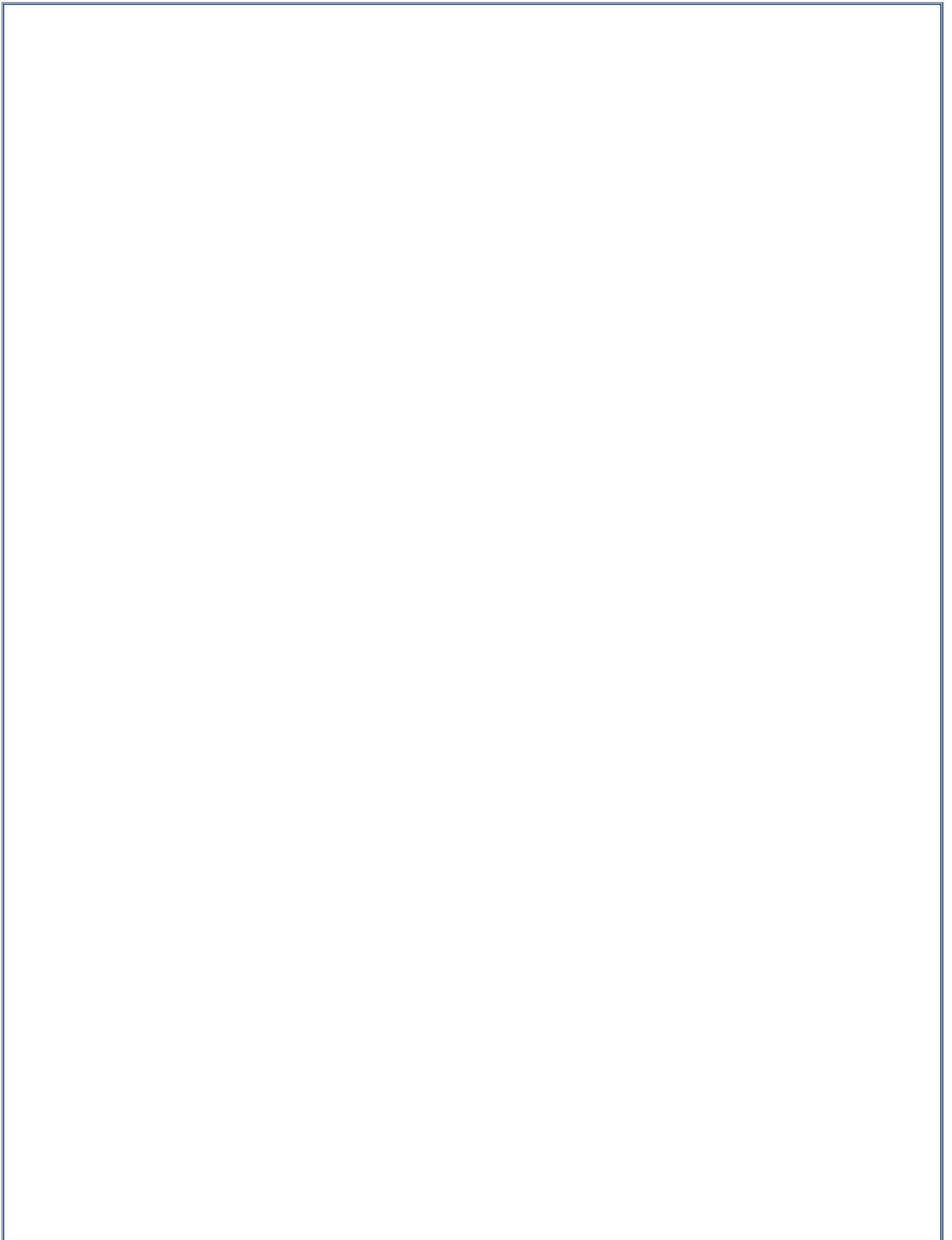
If you are using Adobe Reader, click the PRINT button and use the Print screen to create a hardcopy.



## 4. Return to the Web Portal

Click on the web browser tab for the GTS so you can continue working.

**Tip** In the Upcoming and Overdue Reports tab, use the View Report Period Details icon  to view the notices that were previously created for the case. The Reprint icon  opens the PDF version of the letter.

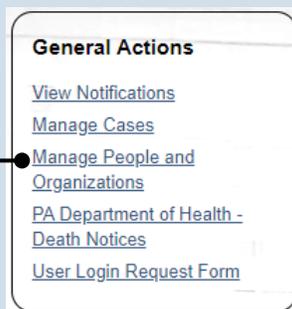




# How to Reprint an Access Code Letter

## 1. Initiate a search

In the General Actions section of your Dashboard, click the *Manage People and Organizations* link.



## 2. Enter the search criteria for the person

On the Participant Search screen, click on the **Search By** dropdown and select 'Person'. Enter the guardian's **Last Name** and **First Name**.

## 3. Click SEARCH

**Tip** If the person is not found, repeat Step 2 using different information for the search.

**Tip** Partial names, with a minimum of two characters, can be used.

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

Name	Type	Address	Identifiers	Other Info
Tracy Goodman-Fox	Person	944 Cherry Lane Apartment B Butler, PA 16001 (Home)		

## 4. Choose the guardian

Based on the search results, click the Edit Record icon that appears to the right of the appropriate guardian.

# How to Reprint an Access Code Letter



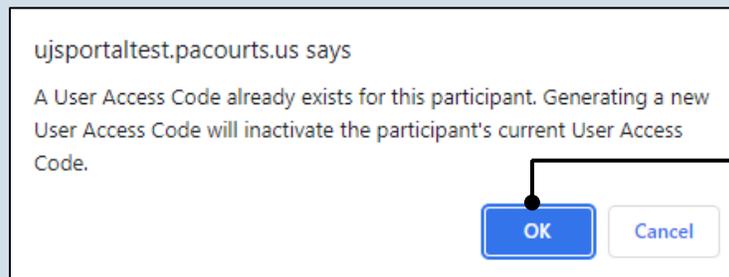
## 5. Generate the access code letter

In the Edit Person/Organization screen, click the Reprint Access Code Letter in the Participant Information grid at the top of the screen.



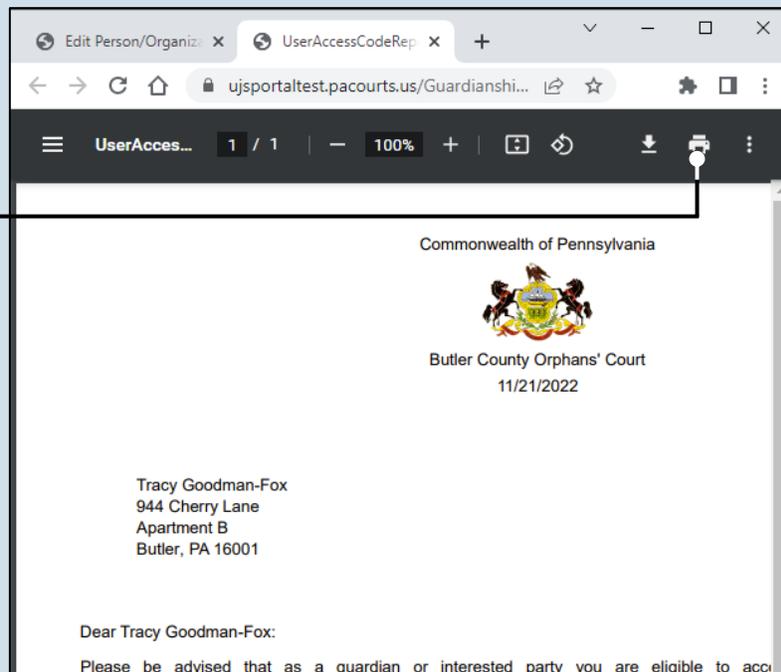
## 6. Confirm a new access code is required

Generating a new access code will disable the one currently in use by the participant. If you are sure you want to disable the original code, click OK.



## 7. Print the access code letter

A separate tab opens in your web browser that displays the access code letter. This letter must be sent through the regular mail. Click the Print icon in the toolbar above the letter and use the Print screen to create a hardcopy.





# How to Suppress a Flag on a Case

## 1. Search for the case

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

**Find a Case**

\* Case File No:

[Advanced Search](#)

## 2. Access the Add Suppressed Flags screen

In the Suppressed Flags tab of the GTS Case screen, click the Add Suppressed Flag icon above the grid.

<a href="#">Incapacitated Person</a>	<b>Suppressed Flags</b>						
<a href="#">Case Actions</a>	+						
<a href="#">Guardians</a>	<table border="1" style="width: 100%;"> <thead> <tr> <th>Flag Type</th> <th>Category</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table>	Flag Type	Category	Description			
Flag Type	Category	Description					
<a href="#">Other Case Participants</a>							
<a href="#">Attorneys</a>							
<a href="#">Reports</a>							
<a href="#">Bond Ordered</a>							
<a href="#">Suppressed Flags</a>							
<a href="#">Report Reminders</a>							

## 3. Select the flag that needs to be suppressed

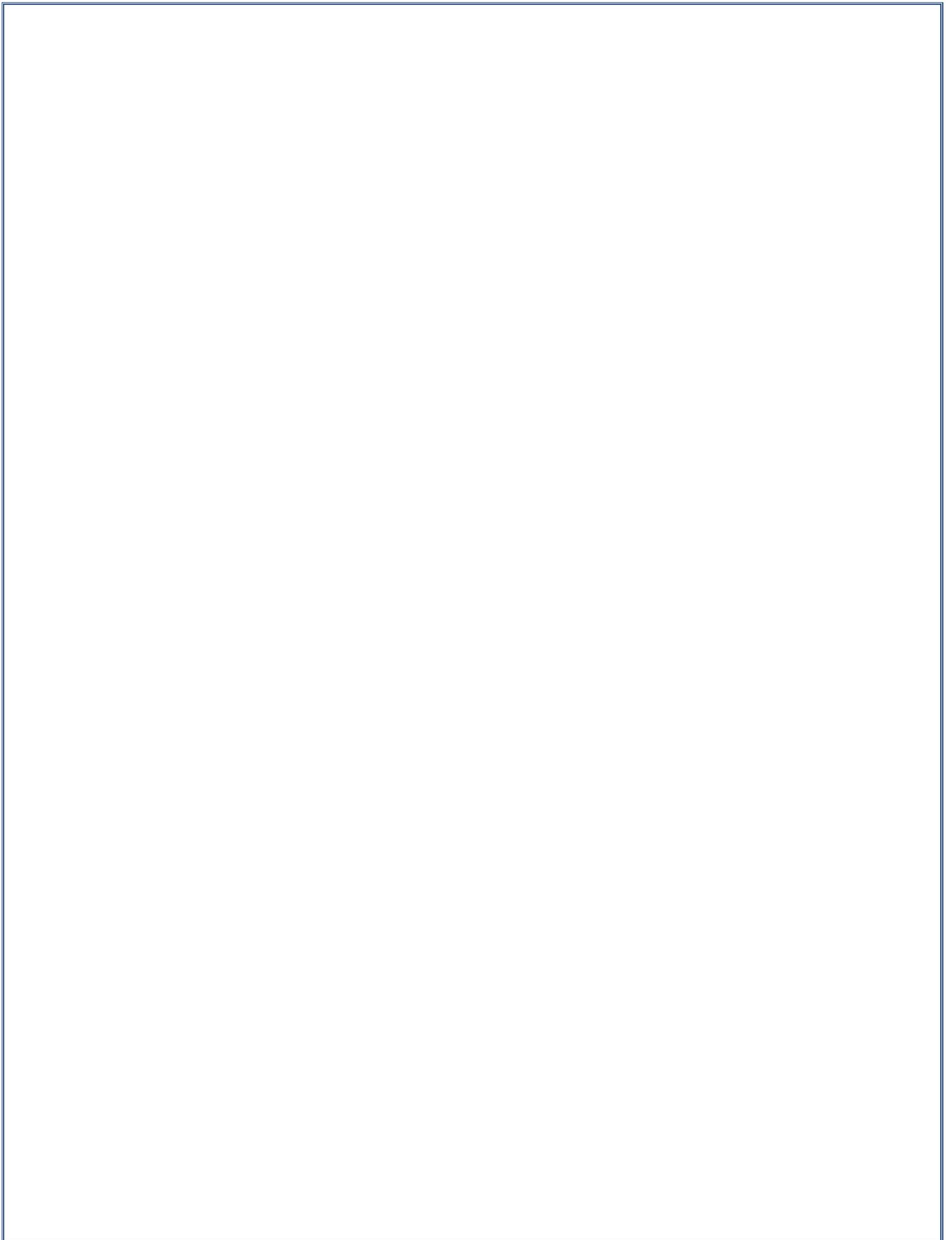
In the Add Suppressed Flag popup, select the radio button in the grid for the appropriate flag

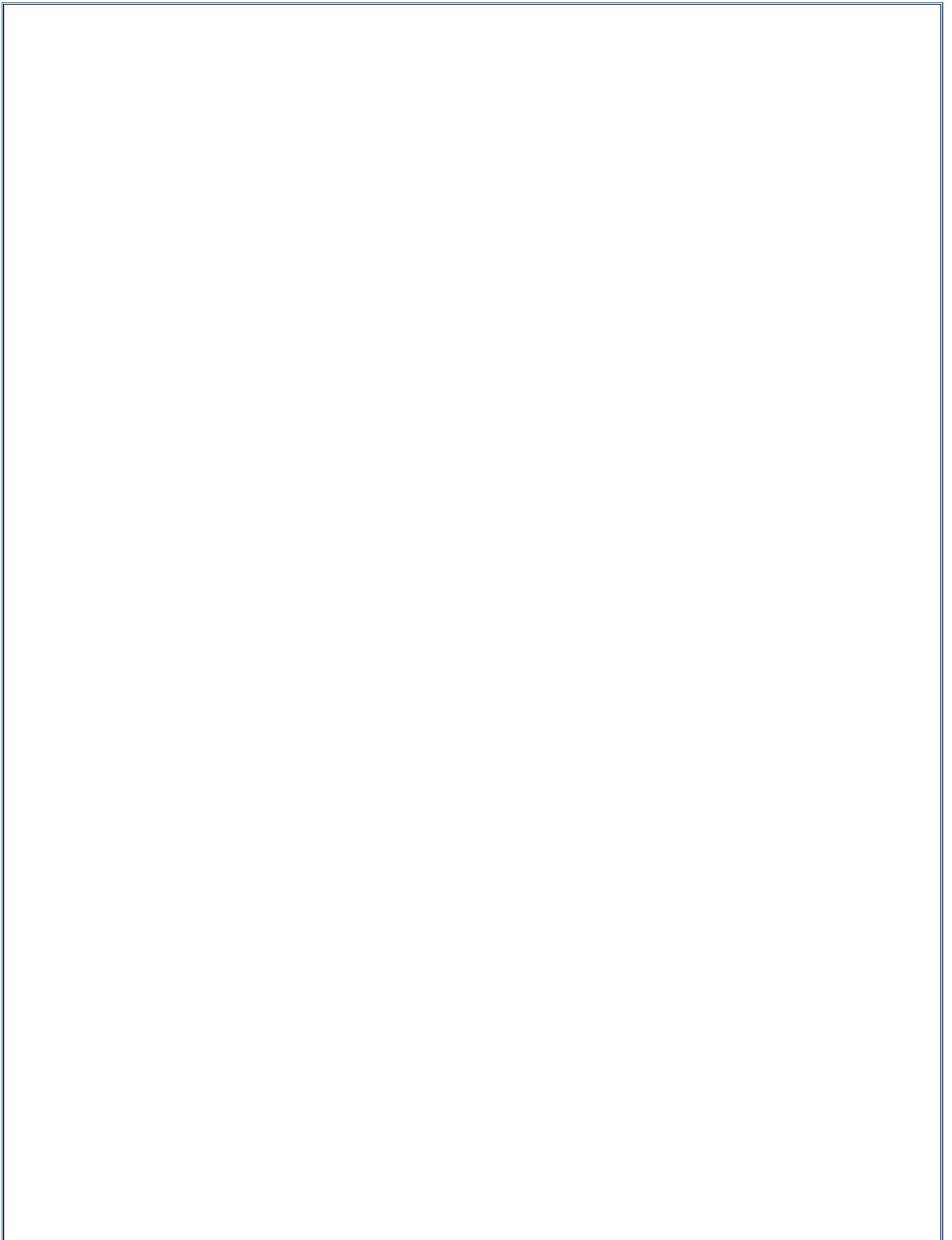
**Add Suppressed Flag**

Flag Type	Category	Description
<input type="radio"/> Total assets exceed 20k-Bond not required	Unprotected Asset	The total assets exceed \$20,000.
<input type="radio"/> Gift Expense	Unapproved Expense	The report includes expenses for [redacted] except by court order.
<input type="radio"/> Utilities Expense	Unapproved Expense	The report includes expenses for [redacted] incapacitated person is a facility.
<input type="radio"/> Missing Documentation-Social Security Benefits	Representative Payee	The guardian is a representative [redacted] benefits Report that the guardian sends to the Social Security [redacted].
<input type="radio"/> Auto Expense	Unapproved Expense	The report includes auto related [redacted] of assets.
<input checked="" type="radio"/> Cable Expense	Unapproved Expense	The report includes expenses for [redacted] incapacitated person is a facility.
<input type="radio"/> No Real Estate-Listed in Assets	Real Estate	The filer indicates that the Incapacitated [redacted] but the Asset List does include real estate.
<input type="radio"/> No Real Estate-Property Tax	Real Estate	The filer indicates that the Incapacitated [redacted] there is an expense recorded for property tax.

## 4. Click SAVE

**Tip** When a flag is suppressed, it will not display in reports even when the condition exists where a flag would normally be presented.





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**