The Unified JUDICIAL SYSTEM of PENNSYLVANIA WEB PORTAL



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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Working with Reports





1. Open the report form

In the Upcoming & Overdue Reports section of your Dashboard, click on the Create Report icon for the correct Inventory report and incapacitated person (IP).



* Inventory Type: Initial

2. Is the IP deceased? On the GTS -Inventory Report screen, select an option from the dropdown.

If you select "No", continue to Step 3.

If you select "Yes", contact the court office at the phone number displayed. You will not complete the Inventory report. Click CANCEL at the bottom of the form.

4. Click the Add Asset icon

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Θ.

Asset Value

SubTotal:

3. Part II, #1: Assets?

If the IP has assets (i.e. bank accounts, real estate, or other personal property), click on the dropdown and select 'Yes', and continue to Step 4.

If not, click on the dropdown and select 'No' and proceed to Step 10.

PART II. ASSETS (PRINCIPAL)

owner(s) in the space below.

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

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

Asset Type Asset Description Name of Co-Owner(s)





9. Part II, #1 (cont.): Add other assets Repeat Steps 4-8 for all the IP's assets.



10. Part II, #2:

Property 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 14.

If you selected 'Yes', continue to Step 11.

If the IP has no property, answer 'No'.

12. 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.

_	
2.	. Is any property (specifically bank accounts or real estate) co-owned by the Incapacitated Person
	* Joint Property: Yes ✓
	a. On what date was the property acquired: 05/27/1993
b.). On what date was the guardian's name added: 09/25/2016
	c. The guardian is: 🛃 an individual having access or control over the account
	an owner of the account
L	

11. Part II, #2a: Date acquired Enter the date on which the property was originally acquired by the IP.

13. Part II, #2c: *Guardian ownership*

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





coverage is valid.









28. Part III, #1 (cont.): Add other income 29. Part IV, #1: Repeat Steps 25-27 for Liability/debt? any additional sources If the IP has any of income for the IP. outstanding liabilities or debts, click on the dropdown and select 'Yes', and continue to PART IV. LIABILITIES/DEBTS Step 30. 1. List all debts the Incapacitated Person owes, including mortgages, loans, credit card debt, e If not, click on the * Do you wish to enter liabilities and debt details for the incapacitated Yes ~ dropdown and select person: 'No' and proceed to 働∙ 30. Part IV, #1 Step 35. (cont.): Click the Liability/Debt Lender Value Add Income SubTotal: Source icon





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

34. Part IV, #1 (cont.): Add other liabilities/ debts

Repeat Steps 30-33 to enter any additional liabilities/debts owed by the IP.



35. 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 you as guardian.



IP's estate. Tip: If the information that defaults is incorrect, contact the court where the case is filed before you proceed with the

report. 37. Part V, #2:

(cont.): Liability coverage Click on the

dropdown and select 'Yes' or 'No' to specify if you maintain personal liability coverage.

If you select 'Yes', you will need to upload a copy of your insurance policy to the Inventory report. This can be completed in Step 66.

PART V: GUARDIAN COVERAGE	
1. Was a surety bond required by the decree a	appointing you as guardian?
* Surety Bond Required:	Yes 🗸
Please attach a copy of the bo	nd using the (Upload Document) button found at
2. Are you a professional guardianship agenc	y or an attorney serving as a guardian?
* Professional Status:	Yes 🗸
Do you have professional liability coverage?	Yes 🗸

36. Part V, #2: *Professional guardian?*

Click on the dropdown and select 'Yes' or 'No' to specify if you work for a professional guardianship agency or are an attorney.

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

If you selected 'No', proceed to Step 38.





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 (not pictured).







45. Part VII, #1b: Annual expenses Enter the estimated annual expenses, in U.S. dollars, for the care of the IP.

The other fields in this question will display information based on the details you have already entered.

47. Part VII, #3: Government benefits

If an application(s) has been submitted on behalf of the IP for government benefits, click on the Add Government Benefit icon and continue to Step 48.

If no applications have been submitted, proceed to Step 51.

49. 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.

51. Part VII, #4: Real estate

If applicable, summarize how any real estate owned by the IP will be sold and/or maintained during the guardianship.

PART VII: FINANCIAL PLAN	
1. Complete the following table using initial in	ventory or most recent amended inventory
a. Total Annual Income: 11432	Note: This is a co
* b. Annual Estimated Expenses: 12327	<u></u>
c. Net Income: -895	Note: This is a co
d. Total assets (principal): 2088	Note: This is a co
2. Is the net income listed above sufficient to c	care for the needs of the Incapacitated Person?
* Sufficient Income: No, but a	assets (principal) are availab 🗸 🗨
3. Indicate any applications for government be	enefits that have been submitted:
4. Describe all real estate included in the estate Real Estate Description: IIP has a Sandy R Camero	te and how it will be maintained or sold a residence at 417 Maple Ave Ridge, PA 16677 and guardian on Boggs is in charge of the
J	

46. 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.

48. Part VII, #3: *Application Type* Click on the **Application Type** dropdown and select the best option.

If you choose 'Other' you must describe the type of benefits received.

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

Repeat Steps 47-49, as needed, for any additional applications that need to be entered.



52. 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 guardianship.

If you selected 'Yes', continue to Step 53.

If you selected 'No', proceed to Step 55.

54. 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.

56. Part VIII, #2: Durable power of attornev

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 57.

If you selected 'No', proceed to Step 58.

For more information on durable power of attorneys or a POLST, click on the Learn More icon 2 appearing to the right of this field.



53. Part VII, #5 (cont.): Accounting

Click on the dropdown and specify if an accounting, which is a log of all income received and expenses paid on behalf of the IP, has been requested by and/or submitted to the court.

55. Part VIII, #1: Do not resuscitate (DNR) Click on the dropdown

and specify if a DNR order exists for the IP.

For more information on DNR's, click on the Learn More icon appearing to the right of this field.

57. 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.



58. Part VIII, #3: Funeral & burial Click on the dropdown and specify, to your knowledge, if the IP has a will, trust, or 59. Part VIII, #3 explicit funeral and (cont.): burial wishes. Explanation If you selected 'Yes', Summarize what you continue to Step 59. know about the IP's 3. Are you aware of any will or trust executed by the Incapacitated Person, and/or any funeral of * Posthumous Provision of Will or Trust: Yes will. trust. and/or their If you selected 'No', funeral and burial * Posthumous Provision Explanation: The IP's will has been executed and is housed in safe deposit box. wishes. proceed to Step 62. 60. Part VIII, #3 * Burial Account Established: Yes ~ (cont.): Burial * Burial Account Value: 1323 account Click on the 61. Part VIII, #3 dropdown and specify (cont.): Value of if money has been set burial account aside for burial, in a Click in the field and bank account or some enter the value of the other holding, or burial account in U.S. prepaid burial dollars. arrangements have been made. 62. Co-guardians? 63. Co-guardians If there is more than consent Do you have the consent of all co-guardians representing the incapacitated person to submit one guardian named incapacitated person to submit this report to the court. I hereby swear/affirm that the information Select the Yes or No. on this report under radio button to state * Co-guardian consent: OYes Part I, Question #1, whether the report is ⊖No continue to Step 63. being submitted with the consent of all guardians. Otherwise, proceed to Step 64. If you selected Yes, you must enter a home, business, or cell phone number and an e-mail address for each co-guardian.

These radio buttons will not appear if only one guardian is responsible for this report.

15



64. Signature and Affirmation Verify/update your address information. You must enter an e- mail address and a home, business, or a cell phone number.		65. (Optional) — Signature and Affirmation (cont.): Comments
In the Signature of Guardian field, your name is preceded by a /s/. This symbol, when followed by your name, is an established way to indicate that you have signed an electronic document.		If you have any additional information that you want to provide to the court about the guardianship, enter them in the comments field provided.
SIGNATURE AND AFFIRMATION		
Date Signature of Guardian (?) Name of Guardian (?) 11/28/2022 /s/ Cameron Boggs Cameron Boggs	uardian Location Address Line 1 (?) Address Line 2 Address Line 3 City State Zip Code Ter loggs Unitr V 341 Lincoln Ave. Sai FV 16677	tory Postal Code Country Home Phone ?
Please include any comments you would li	e to make for this report:	





68. Signature and Affirmation (cont.): Checkboxes

Read and select the checkboxes that indicate the information you provided is true and that you will serve a Notice of Filing to the other interested parties on the case.

A copy of the notice of filing form can be obtained at http://www.pacourts.us/ forms/for-thepublic/orphans-courtforms. This form cannot be served to the eligible recipients through the GTS. This must be completed through other delivery methods (ex. mail, fax, personal delivery, e-mail).

-• <mark>~</mark>	 I, the guardian of the Estate, verify that the foregoing information is correct to the best of my kn I, the guardian of the Estate, further acknowledge that the Notice of Filing must be served within 					
	Next Action:	⊖Save				
		○Save and Close				
		○Ready for Submission	•			
		⊖Submit				
		Ok Cancel View Dr	aft			

69. File now or later?

Choose one of the following and click OK:

Option 1: If you want to submit this filing now, select the **Submit** radio button and, if payment is required, consult the *How to Submit a Filing with a Fee and make a Payment* reference guide. This button is only available to those with the authority to submit reports in GTS.

Option 2: If you do not want to submit your filing now, select the **Save and Close** radio button. When you are ready to file, you can access this report through your Dashboard and then follow Option 1.

<u>Option 3:</u> If you want to submit your filing simultaneously with another report, select the **Ready for Submission** radio button. Follow the *How* to *Submit Multiple Reports simultaneously* reference guide.

<u>Option 4:</u> If you do not have authority to submit a report in GTS and it must be reviewed by someone else prior to submission, select the **Ready for Review** radio button (not pictured).



Pennsylvania's Unified Judicial System Web Portal

How to Complete a Guardian of the Estate Report



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

2. Part I, #1 & #2:

If any of the information that defaults is incorrect, contact the court where the case is filed before you proceed with the report.

1. Open the report . form

In the Upcoming & Overdue Reports section of your Dashboard, click on the Create Report icon for the correct Estate report and incapacitated person (IP).



COURT OF COMMON PLEAS OF	
CENTRE COUNTY, PENNSYLVANIA	
ORPHANS' COURT DIVISION	
Report of Guardian of the Esta	te
Estate of <u>Witt, Donald</u> , an Incapacitated Per Date of Birth: <u>10/10/1941</u> Case File No. <u>OC-1107-2021</u>	rson
DATE COURT APPOINTED YOU AS GUARDIAN	10/5/2021
1 4921 IF	and merel inter land
PART I. INTRODUCTION	
1 Guardian Name(s)	
Guardian Name(s): Cameron Boggs	
2. Is this a limited Guardianship?	
* Limited Guardianship: No	
3. Report Period	
* Report Type: Report	~
* Report Period Start Date: 10/05/2021	
* Report Period End Date: 10/04/2022	
10/04/2022	

3. Part I, #3: Report Type Click on the Report Type dropdown and select the appropriate option.

Conly select 'Final Report' if your guardianship of the IP is coming to an end.















If this is the first Guardian of the Estate report you're filing for this IP, either in GTS or otherwise, leave this field blank. If you have previously filed Estate reports for this IP on paper, but you're filing for the first time in GTS, enter the unspent income from the last paper-filed report.

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19. 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 22.

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 20. If 'No', proceed to Step 21.

21. Part IV, #6 (cont.): Explanation Click in the Invasion of Principal Explanation 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: No ✓





PAR	T V. ASSETS	
1	. What was the value of the assets repo	rted on the Inventory?
	* Inventory Asset: 139088	Note: This is a computed field.

20. 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 22.

22. 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 23.

If the 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 or you can contact the court where this case is filed for this information. Continue to Step 23.







29. Part V, #3: Asset Sold?

Review the list of existing assets and determine if any were sold during the reporting year. This action is only a consideration if you see the Asset Sold icon next to each asset listed. If one or more assets were sold, continue to Step 30.

If no assets were sold or no Asset Sold icons appear, proceed to Step 36.

31. Part V, #3 (cont.): Asset Type Go back to Question Part V, #2 and click the Add Asset icon. * Enter additional asset details?: Yes 33. Part V, #3 Description/Source Asset Type (cont.): **Description**/ Cash and Cash Equivalents (ca: V Real Property Sale (H 137000 Source 976 Investments (Stocks, Bonds, Mu 🗸 Bonds Click in the **Description/Source** field and describe the 137976.00

30. Part V, #3 (cont.): Asset sold

Click the Asset Sold icon that appears to the right of an asset that was sold during the reporting year.

The value of the asset will change to \$0.

If only part of the asset was sold, change the Value to the represent the IP's remaining ownership in the asset.

32. Part V, #3 (cont.): Asset Type Click on the Asset Type dropdown and select 'Cash and Cash Equivalents'.

Adding a new cash asset will show the sale price of the asset that was sold.

34. Part V, #3 (cont.): Value Click in the Value field and enter the sale price in U.S. dollars.

35. Part V, #3 (cont.): Add other assets

item that was sold.

Repeat Steps 30-34 for any other assets that were sold.

3. Where are all the assets deposited or held at the end of the Report Period?					
Asset Type	Description	Location	Co-Owner(s)	Value	
Burial Account 🗸 🗸	Members 1st			1323	
Personal Property 🗸	Clothing			765	
Real Property 🗸 🗸	House		Cameron Boggs	137000	SOLD \$
SubTotal:					
			1	139088	





36. Part V, #3 (cont.): Asset Transferred?

Under Question #3, review the list of existing assets and determine if any were transferred to another person, typically a spouse or child, during the reporting year.

If no assets were transferred or no Asset

Transferred icons appear, proceed to Step 44.

If one or more assets were transferred, continue to Step 37.

38. Part V, #3 (cont.): *Transferee*

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.

40. Part V, #3 (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 41. If 'No', proceed to Step 42.

42. Part V, #3 (cont.): Explanation

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

3. Where are all the assets deposited or held at the end of the Report Period?						
Asset Type	Description	Location	Co-Owner(s)	Value		
Burial Account 🗸 🗸	Members 1st			1323	SOLD	
Personal Property 🗸	Clothing			765		
Real Property 🗸 🗸	House		Cameron Boggs	137000		
				SubTotal:		
			,	39088		

37. Part V, #3 (cont.): Initiate transfer Click the Asset Transferred icon that appears to the right of an asset that was transferred during the reporting year.



39. Part V, #3 (cont.): *Relationship to IP* Click in the Relationship to the IP of the third party... field and specify the recipient's relationship to the IP.

41. Part V, #3 (cont.): Court order date Click in the Court

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

43. Part V, #3 (cont.):

Complete transfer Click the SUBMIT button. Verify that asset now displays under Question #5 below

44. Part V, #3 (cont.): Add/edit a location?

If each asset displayed has a location, none of which have changed during the reporting period, proceed to Step 47.

If there are assets without a location, or the location changed during the reporting period, continue to Step 45.

> Asset Type Description Location Co-Owner(s) Value 1323 Burial Account Members 1st 765 Personal Property 🗸 Clothing Home Real Property 137000 ~ House Cameron Boggs SubTotal: 139088

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

45. Part V, #3 (cont.): Location

Click in the **Location** field and add the address or specific location of the asset.

(cont.): Update other locations Repeat Steps 45 for any other asset locations that need to be added or updated.

46. Part V, #3

GTS





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during the reporting period, enter the purchase price. If not, leave this field blank.





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

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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 54. If 'No', proceed to Step 55.

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

Click in the field (not pictured) and enter a summary that explains why court approval was not obtained to buy or sell the property.

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

Repeat Steps 48-55 to add any additional properties owned by the IP.



58. Part VI, #1: Click the Add

Compensation

icon

57. 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 58.

If 'No', proceed to Step 66.

60. Part VI, #1 (cont.): Guardian name Verify that the correct

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

61. 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 fee.

The **Amount** field is sum of <u>all</u> compensation from the reporting year.

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.



59. Part VI, #1 (cont.): Amount Click in the Amount

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

62. Part VI, #1 (cont.): Add other compensation Repeat Steps 58-61 for any other guardians that received compensation during the reporting period.



63. Part VI, #2: Compensation approved?

If you answered 'Yes' to Question #1 above, click on the dropdown and select 'Yes' or 'No' to specify if the court authorized the compensation to the guardians.

If you answer 'Yes', continue to Step 64.

If you answer 'No', proceed to Step 65.

65. Part VI, #2 (cont.): Explanation Click in the Guardian Compensation Explanation field and enter a summary that explains why court approval was not obtained to compensate the guardian.



64. 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 66.

66. Part VI, #3:

Activities log Click on the dropdown and select 'Yes' or 'No' to specify if you maintained a log of the activities you have completed on behalf of the IP.

If you select 'Yes', you can upload a copy of your log to the Guardian of the Estate report. This can be completed in Step 122. The document must be saved as a PDF. If you are unable to submit the log online, you can submit it to the court through the regular mail.

A log may include things like the services the guardian performed for the IP, the date of service, and amount of time spent.








77. Part VII, #1 (cont.): Add other fees Repeat Steps 68-76 for any other attorneys that received compensation during the reporting period.

78. Part VIII, #1a: SSA benefits

84.



Select the checkbox if the IP did NOT receive Social Security Administration (SSA) benefits during the reporting year. If you did not select the checkbox, continue to Step 79. If you selected the checkbox, proceed to Step 81. 80. Part VIII, #1a PART VIII. REPRESENTATIVE PAYEE (cont.): Name of representative 1a. Social Security Administration (SSA) benefits pavee The Incapacitated Person does not receive SSA benefits: Does the guardian act as the representative payee for SSA benefits?: No Click in the field and enter the name of the Representative Payee: Cameron Boggs person acting as the 1b. Veterans Administration (VA) benefits representative payee of The Incapacitated Person does not receive VA benefits: the IP's SSA benefits. * Does the guardian act as the fiduciary for VA benefits?: No v VA Benefits Fiduciary: Cameron Boggs 82. 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 have the option to upload a copy of your VA report, if one was completed, in Step 122. Proceed to Step If you selected 'No', continue to Step 83.

79. Part VIII, #1a (cont.): Representative pavee

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 have the option to upload a copy of your SSA report, if one was completed, in Step 122. Proceed to Step 81.

If you selected 'No', continue to Step 80.

81. Part VIII, #1b: VA benefits

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

If you did not select the checkbox, continue to Step 82.

If you selected the checkbox, proceed to Step 84.

83. Part VIII, #1b (cont.): Name of fiduciarv

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

84. Part IX, #1:

Surety bond Confirm that the information appearing in the first two fields correctly show if (1) a surety bond was required by the decree that appointed you as guardian and (2) the amount. If a bond was required, continue to Step 85. Otherwise, proceed to Step 90.

A court may require a guardian to obtain a surety bond when they have been made responsible for handling the fiduciary duties of an IP's estate.

If the information that defaults is incorrect, contact the court where the case is filed before you proceed.

86. Part IX, #1 (cont.):

pictured) and

Explanation

Click in the field (not

summarize why the

surety bond is no

longer in effect.

88. 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 89. If 'No', proceed to Step 90.

	85. Part (con still i Click on and select
PART IX. SURETY INFORMATION	to specify
1. Was a surety bond required?	bond is s
* Surety Bond Required: Yes 🗸 🖓	'Yes', pro
Surety Bond Amount: 140000	87. IT NO
Surety Bond In Effect: Yes	_ Step 86.
Is the value of the estate at the end of the Report Period greater than the Yes	
■ The amount of the surety bond been increased?: Yes	
To what amount?: 200000 V	
	87. Part
	(con the E Click on and sele to specify value ha 'No', pro- 90.
	lf it defau continue
	89. Part (con Click in t amount enter the

35



5. Part IX, #1 (cont.): 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 87. If 'No', continue to Step 86.

87. Part IX, #1 (cont.): 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 90.

If it defaults to 'Yes', continue to Step 88.

89. Part IX, #1 (cont.): Amount Click in the To what amount? field and enter the new amount of the surety bond.

Guardianship Tracking System

How to Complete a Guardian of the Estate Report

90. Part IX, #2: Liability insurance?

Click on the dropdown and select 'Yes', 'No', or 'N/A' if you have professional/guardian liability insurance that covers theft.

If 'Yes', continue to Step 91.

If 'No' or 'N/A', proceed to Step 93.

92. Part IX, #2

(cont.): Deductibles and exclusions Click in the field and enter the deductible and any exclusions that apply to your liability coverage.

coverage.			Information Click on the dropdown and select 'Yes' or 'No' if the guardian participated in any
	PART X. GUARDIAN INFORMATION 1. During this Report Period, did any guardian participate in guardiansk * Guardianship Training: Yes If yes, provide the followir		guardianship-related training or received/renewed a guardianship certification.
94. Part X, #1 (cont.): Click the Add Training/ Certificates icon	Participated In Guardian Name Training/Certification Start Date Train No	vider Desci	If 'Yes', continue to Step 94. If 'No', proceed to Step 102.

2. If you are a professional guardian, agency or an attorney serving as a guardian, do you have p * 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.

91. 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.

93. Part X, #1:

Guardian







96. 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.

98. 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.

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charge Repeat Steps 108-110 if any co-guardians were charged with or convicted of a crime.

Guardianship Tracking System



112. 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. 4. Is there any reason any guardian cannot continue to serve as a guardian? If 'No', proceed to Step * Guardian Cannot Continue: Yes ~ 113. Part X. #4 117. (cont.): Click the If yes, provide the following information Add Reason If 'Yes', continue to **Е** icon Step 113. Description Guardian Name \square Cameron Boggs Continued service is no longer in the 114. Part X, #4 (cont.): Name of guardian Click on the Guardian 115. Part X, #4 Name dropdown and (cont.): select the name of Description guardian that can no Click in the longer serve. **Description** field and briefly summarize why the selected guardian can no longer serve. PART XI. SUMMARY 116. Part X, #4 1. If this is the first annual report, state the value of the assets reported on the Inventory. (Am (cont.): Add other Value of the assets reported on the Inventory: 139088 reasons 2. If this is not the first Report, state the Total Assets (principal) from the prior Report. (TOTA Repeat Steps 113-115 117. Part XI: Prior Total Assets: 0 if there are any co-Summary guardians that also 3. What was the total amount of Income received during the Report Period? (The amount fro Review the information have reasons why they Net Income: 11532 in this section for can no longer serve. 4. What is the total amount of Expenses paid during the Report Period? (The amount from PA accuracy. Each Total Expenses: 8350 question refers to the source of each amount 5. What are the Total Assets remaining at the end of the Report Period? (The amount from PA that displays. If Total Assets: 138323 something is incorrect, 6. What is the Unspent Income at the end of the Report Period? (The amount from PART IV of return to the Unspent Income: 3182 appropriate section of this report to make the change or contact the court for assistance.







122. (Optional) Signature and Affirmation (cont.): **Documents** If you have supplemental

documents that you want to submit to the court, particularly if you were prompted in Steps 66, 79, or 82, click the (Upload Document) link icon and continue to Step 123.

Otherwise, proceed to Step 124.

124. Signature and
Affirmation
(cont.):
Checkboxes
Read and select the
checkboxes that
indicate the information

cate the infor you provided is true and that you will serve a Notice of Filing to the other interested parties on the case.

A copy of the notice of filing form can be obtained at http://www.pacourts.us/ forms/for-thepublic/orphans-courtforms. This form cannot be served to the eligible recipients through the GTS. This must be completed through other delivery methods (ex. mail, fax, personal delivery, e-mail).

		• •
Document Name	File	
	Choose File No file chosen	

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\leftrightarrow \rightarrow \checkmark \uparrow	> This	PC	~ Ō	Search New	folder	Q
Organize 🔻 🛛 N	lew folder				•	
📥 Quick accord	^	Name	Date mo	odified	Туре	Siz
Desktop	*	🔁 Guardianship Log 2021-2022	11/18/20	22 11:12 AM	Adobe Aci	robat D 🔴
🕹 Downloads	*					
Documents	*					
Pictures	*					
	~					
	File nar	ne: Home Owners Policy	~	All File: (*.*)	~
				Open		Cancel

I, the guardian of the Estate, verify that the foregoing information is correct to the best of my k I, the guardian of the Estate, further acknowledge that the Notice of Filing must be served with

* Next Action: OSave ⊖Save and Close OReady for Submission OSubmit

Ok Cancel View Draft

123. 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. Documents created in Microsoft Office can be saved as a PDF using built-in tools with Word, Excel, etc. Other PDF making tools are available on the internet.



125. File now or later? Choose one of the

following and click OK:

<u>Option 1</u>: If you want to submit this filing now, select the **Submit** radio button and, if payment is required, consult the *How to Submit a Filing with a Fee and make a Payment* reference guide. This button is only available to those with the authority to submit reports in GTS.

Option 2: If you do not want to submit your filing now, select the **Save and Close** radio button. When you are ready to file, you can access this report through your Dashboard and then follow Option 1.

<u>Option 3</u>: If you want to submit your filing simultaneously with another report, select the **Ready for Submission** radio button. Follow the *How to Submit Multiple Reports simultaneously* reference guide.

Option 4: If you do not have authority to submit a report in GTS and it must be reviewed by someone else prior to submission, select the **Ready for Review** radio button (not pictured).





Pennsylvania's Unified Judicial System Web Portal

How to Complete a Guardian of the Person Report



1. Open the report form In the Upcoming & Overdue Reports section of your Dashboard, click on the Create Report icon for the correct Person report and incapacitated person

(IP).



COURT OF COMMON PLEAS OF CENTRE COUNTY, PENNSYLVANIA
Report of Guardian of the Person
Estate of <u>Witt, Donald</u> , an Incapacitated Person Date of Birth: <u>10/10/1941</u> Case File No. <u>OC-1107-2021</u> DATE COURT APPOINTED YOU AS GUARDIAN: <u>10/5/2021</u>
PART I. INTRODUCTION
1. Guardian Name(s)
Guardian Name(s): Cameron Boggs
2. Is this a limited Guardianship?
* Limited Guardianship: No
3. Report Period
●* Report Type: Report V
* Report Period Start Date: 10/05/2021
* Report Period End Date: 10/04/2022

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

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

If any of the information that defaults is incorrect, contact the court where the case is filed before you proceed with the report.

3. Part I, #3: Report Period

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

Only select 'Final Report' if your guardianship of the IP is coming to an end.



4. Part II, #1: *IP's DOB* Verify or update the IP's date of birth.



6. 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', you must click on a second dropdown and select the type of home assistance the IP is receiving.

 If you choose
'Relative's home', you
must 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', you must click on a second dropdown and specify if the IP is in a memory support facility.

• If you choose, 'Other', you must describe the residence or facility.

Your Home	
3. Residence of the Incapacitated Person	
Type of Residence/Facility:	Your home 🗸

<u>IP's Home</u>

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 Case 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	~



7. 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 5.

9. Part III, #1, Medical Professionals?

If the IP was seen by a medical professional during the reporting period, continue to Step 10.

If the IP was not seen by any medical professionals during the reporting period, or this information is unavailable, proceed to Step 14.

11. 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.

13. Part III, #1 (cont.): Add other medical professionals

Repeat Steps 10-12 for any other medical professionals the IP visited.



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

Click on the dropdown and select 'Yes' or 'No' to specify if the IP moved during the reporting period.

If you selected 'No', continue to Step 9.

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

10. Part III, #1 (cont.): Click the Add Medical Professionals icon

12. Part III, #1 (cont.): Name Click in the Name field and enter the name of

the doctor or medical professional.

1. Li	st the medical professionals wh	io have seen	the Incapacitated Person d	uring the Report P
	_			€
	Medical Professional Type	Description	Name	
	Ear Doctor 🗸		Dr. Arianna Bloom	
	Medical Doctor 🗸		Dr. Ronald Lefkowitz	ÎÎÎ

PART III. MEDICAL INFORMATION



14. Part III, #2: Medical/ psychiatric problems List the major medical or psychiatric problems of the IP. These should only include problems diagnosed by a licensed professional. 15. Part III, #3: Services for the If applicable, this IP information populates 2. The major medical or psychiatric problems of the Incapacitated Person are as follows automatically from the Click in the field and Major medical or psychiatric problems: Dementia, Hiatal Hernia, Dermatitis, Scc previous year's report enter any support and can be updated as 3. Describe any social, medical, psychological and support services the Incapacitated Person is services that the IP is needed. Support services received: Socializes with staff and peers at day pr receiving. 4. Has the Incapacitated Person been hospitalized during the Report Period * Incapacitated Person Hospitalized: Yes 16. Part III, #4: ~ Date(s) of hospitalization: 09/09/2022 - 09/15/2022 Hospitalization Click on the 5. Has the Incapacitated Person received a mental health assessment during the Report Period dropdown and select 17.Part III, #5: * Incapacitated Person Mental Health Assessment: Yes ~ 0 'Yes' or 'No' to specify * Date(s) of MH Assessment: 12/14/2021 Mental health if the IP was assessment hospitalized during Click on the dropdown the reporting period. and select 'Yes' or 'No' to specify if the IP If you selected 'No', received a mental continue to Step 17. health assessment during the reporting If you selected 'Yes', period. use the Date(s) of hospitalization field If you selected 'No', to identify each continue to Step 18.

Guardianship Tracking System

If you selected 'Yes', use the **Date(s) of MH Assessment** field to identify when it

occurred. Continue to

Step 18.

instance. Continue to

Step 17.



18. Part IV, #1:

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

'Continued' signifies your recommendation that the guardianship should continue under the existing court order.

'Continued with modifications' is your recommendation that the guardianship should continue, but the IP has either gained or lost capacity in one or more areas and the court should modify the existing court order.

20. Part IV, #3: Petition for modification or

termination?

Click on the dropdown and select 'Yes' or 'No' to specify if you have filed a petition with the court to modify or terminate the guardianship.

22. Part V, #2:

Average length of visit

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



23. Part V, #3:

Guardianship log Click on the dropdown and select 'Yes' or 'No' to specify if you've kept a guardianship log.

If you selected 'Yes', you can upload a copy of your log in Step 61. The document must be saved as a PDF. If you are unable to submit the log online, you can submit it through the regular mail.

A log may include things like the services performed for the IP, the date of service, and amount of time spent.

d a tep ust If	
,	
nail.	
	3. Have you maintained a log of your activities as a guardian?
e es	* Guardian Activity Log: Yes
the	Please attach a copy using the (Upload Document) button found at the bottom of the page
	4. Guardianship Training/Certification
τ.	* Guardianship Training: Yes 🗸 🗣
	(••)
	Participated In Guardian Name Training/Certification Start Date Training/Certification End Date
	No results found

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



24. Part V, #4: Training/ Certification

Click on the dropdown and select 'Yes' or 'No' to specify if you have participated in guardianship training or received/renewed a certification during the reporting period.

If you selected 'No', proceed to Step 33.

If you selected 'Yes', continue to Step 25.





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48. 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. 49. Part V, #8: Click the Add If 'Yes', continue to Compensation Step 49. icon If 'No', proceed to Step 57. 50. Part V, #8: 8. Did the Guardian receive compensation during the Report Period? (cont.): Amount * Guardian Compensation: Yes ~ Click in the **Amount** field and enter the total Complete the table below amount, in U.S. dollars, Ð received in payment for 51.Part V, #8: guardianship services Fee Frequency If Hourly, # of Hours Amount Guardian Name (cont.): Guardian during the reporting name 500 Joseph K Zimmerman 🗸 Annual ~ \square year. Verify that the correct name appears in the Guardian Name field or click on the 52.Part V. #8: dropdown and select (cont.): Free the correct option. frequency Click on the Fee Frequency dropdown and select the option that best describes the time interval in which the guardian routinely charged their fee. 53. Part V, #8: (cont.): Add other The Amount field is compensation sum of all compensation Repeat Steps 49-52 for from the reporting year. any other guardians The If Hourly, # of that received compensation during Hours field is only used if the reporting period. the Fee Frequency is 'Hourly.' If so, enter the total hours worked during the reporting year.



 54. Part V, #9: Compensation approved? If you answered 'Yes' to Question #1 above, click on the dropdown and select 'Yes' or 'No' to specify if the court authorized the compensation to the guardians. If you answer 'Yes', continue to Step 55. 			
If you answer 'No', proceed to Step 56.	9. Was the compensation approved by the court? * Guardian Compensation Approved: Yes * Guardian Compensation Order Date: 07/20	/2022	- 55.Part V, #9 (cont.): Court order date Click in the Guardian

order date Click in the Guardian Compensation Order Date field and enter the date of the order that authorized the compensation. Proceed to Step 57.

56. Part V, #9 (cont.): Explanation Click in the Guardian Compensation Explanation field and enter a summary that explains why court approval was not obtained to compensate the guardian.



57.Co-guardians?

If there is more than one guardian named on this report under Part I, Question #1, continue to Step 58.

Otherwise, proceed to Step 59.

59. Signature and Affirmation

Verify/update your address information. You must enter an email address and a home, business, or a cell phone number.

In the **Signature of Guardian** field, your name is preceded by a /s/. This symbol, when followed by your name, is an established way to indicate that you have signed an electronic document. Do you have the consent of all co-guardians representing the incapacitated person to submi incapacitated person to submit this report to the court. I hereby swear/affirm that the informatio

* Co-guardian consent: OYes

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 Ph Uniti 🗸 341 Lincoln Ave. 11/29/2022 /s/ Cameron Boggs Cameron Boggs Sar F 🗸 16677 Unil 🗸 • Please include any comments you would like to make for this report: 60. (Optional) Signature and Affirmation (cont.): **Comments** If you have any additional information that you want to provide to the court about the quardianship, enter them in the comments field provided.

58. Co-guardians consent Select the Yes or No

radio button to state whether the report is being submitted with the consent of all guardians.

If you select **Yes**, you must enter at least one phone number and e-mail for each co-guardian.

If you select **No**, coguardians retain the option to file a separate report for the reporting year through the Case Actions tab of the GTS Case screen.



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61. (Optional) Signature and Affirmation (cont.): Documents

If you have supplemental documents that you want to submit to the court, particularly if you were prompted in Step 23, click the Upload Document icon, and then the CHOOSE FILE button. Continue to Step 62.

If you have no documents to upload, proceed to Step 63.



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\leftrightarrow \rightarrow \checkmark	> This PC	✓ Ö Search New	folder 🔎
Organize 🔻 🛛 N	ew folder		::: • 🔟 ?
at Ouistansee	^ Name	Date modified	Type Si
Desktop	📕 📃 Guardianship Log 2021-2022	11/18/2022 11:12 AM	Adobe Acrobat D
Downloads	*		
Documents	*		
Pictures	*		
			a
	File name: Home Owners Policy		
		Open	Cancel

62. 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.

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.



63. Signature and Affirmation (cont.): Checkboxes

Read and select the checkboxes that indicate the information you provided is true and that you will serve a Notice of Filing to the other interested parties on the case.

Tip A copy of the notice of filing form can be obtained at http://www.pacourts.us/ forms/for-thepublic/orphans-courtforms. This form cannot be served to the eligible recipients through the GTS. This must be completed through other delivery methods (ex. mail, fax, personal delivery, e-mail).

I, the guardian of the Person, verify I, the guardian of the Person, further	that the foregoing information i er acknowledge that the Notice	s correct to the best of my of Filing must be served w
* Next Action	© Save	
	○Save and Close	•
	○Ready for Submission	•
	⊖Submit	
	Ok Cancel View Draft]

64. File now or later?

Choose one of the following and click OK:

Option 1: If you want to submit this filing now. select the Submit radio button and, if payment is required, consult the How to Submit a Filing with a Fee and make a Payment reference guide. This button is only available to those with the authority to submit reports in GTS.

Option 2: If you do not want to submit your filing now, select the Save and Close radio button. When you are ready to file, you can access this report through your Dashboard and then follow Option 1.

Option 3: If you want to submit your filing simultaneously with another report, select the **Ready for Submission** radio button. Follow the How to Submit Multiple Reports simultaneously reference guide.

Option 4: If you do not have authority to submit a report in GTS and it must be reviewed by someone else prior to submission. select the Ready for Review radio button (not pictured).



How to Amend a Submitted Report



1. Access the GTS Case screen

In the Active Cases tab of the Dashboard, click on the View Case Details icon for the case that needs to have a report amended.

<u>ctive Cases (</u>	<u>1)</u>					
Easy access f	or Guardi	ans, Attorneys and interes	sted partier	active case pa	rticipant:	-
Case File No.	County	Caption	Guardia	judication Date	Status	
		Guardianship of Hollings,	Hollings,	09/00/2021	Adjudicated	



2. Access the list of reports On the GTS Case screen, click on the Reports tab.

3. Open the report that needs to be amended

Click the Amend Report icon to the right column of the report that needs to be updated.

GTS Case -	OC-100	1-2021 - 0	Guar	dianship					
General Information									
Judicial Authority	Is Sealed ?	Filing Fees Waiv	ed ?	Case Status	🚺 🥼 Ha	as Notes			
Yeager, S. Micha 🗸				Adjudicated Incapacitated	n N				
Incapacitated Person					<u>1</u> =				
Case Actions	Repo	rt D	ue Date	Status	ags /				
Guardians	Inven	tory 11/	/09/2021	Accepted	/	₽			
Other Case Participa	nts Perso	n 11/	/09/2022	Accepted	1	0			
Reports					1				
Bond Ordered					1				

How to Amend a Submitted Report



5. Make the		
changes to the report	Please include any comments you would like to make for this report:	
	Please attach any supporting documentation	
	Document Name File No results found I, the guardian of the Person, verify that the foregoing information is correct to the best of my knowledge, information and belief, and that this Verification is subject to the penalties of 18 Pa.C.S. § 4904 relative to unsworn falsification to authorities. I, the guardian of the Person, further acknowledge that the Notice of Filing must be served within 10 days of the filing of this report, pursuant to Pa. O.C. Rule 14.8(b). Service shall be in accordance with Pa.O.C. Rule 4.3. Next Action: Save Save and Close Ready for Submission Ok Cancel View Draft	 6. Submit the filing Choose from one of the following options and click OK: <u>Option 1</u>: To submit this filing, select the Submit radio button. This is only available to those with the authority to submit reports in GTS

Option 2: If you do not want to submit your filing now, select the Save and Close radio button. When you are ready to file, you can access this report through your Dashboard and then follow Option 1.

Option 3: If you do not have authority to submit a report in GTS and it must be reviewed by someone else prior to submission, select the **Ready for Review** radio button (not pictured).

Pennsylvania's Unified Judicial System Web Portal

How to Resubmit a Filing that was Returned for Corrections



This reference guide assumes you have received a notification indicating that a filing has been returned for corrections and have reviewed the comments.

1. Access the report that needs correction In the Upcoming and Overdue Reports section of your Dashboard, look for the report with a **Status** of 'Returned for Correction'. Click the Create Returned for Correction Report icon.

Upcoming and	Overdue	e Reports (4)				
Quick access	to upcom	ing inventory rep	• ports ti	hat are due or	may be overdue.	₩.
Case File No.	County	Caption	eport	Status	Due	
OC-222-2022	Adams	Guardianship of Er Incapacitated Per	ventory	Returned for Correction	10/15/2022 (11 days overdue)	Ð
	-					

3. Submit the filing

Choose from one of the following options to determine how to proceed, then click OK.

Option 1: To submit this filing, click the **Submit** radio button. This button is only available to those with the authority to submit reports in GTS.

<u>Option 2</u>: If you do not have authority to submit a report in GTS and it must be reviewed by someone else prior to submission, select the **Ready for Review** radio button (not pictured).

Р	ease include any comments you would like to make for this Added the missing debt amounts.	
Plea	ase attach any supporting documentation	
	Document Name File	
~	I, the guardian of the Estate, verify that the foregoing information is correct to the best of my knowledg the penalties of 18 Pa.C.S. § 4904 relative to unsworn falsification to authorities.	ge, informat
~	I, the guardian of the Estate, further acknowledge that the Notice of Filing must be served within 10 d Service shall be in accordance with Pa. O.C. Rule 4.3.	ays of the f
	Next Action: O Save	





2. Make the necessary corrections

The report does not display the reason it was returned for correction. Refer to the notification you received for this information.

4. Complete the payment screen Click the OK button.

If your filing required payment, you do not have to submit payment again.



Submission & Payment



Pennsylvania's Unified Judicial System Web Portal

How to Submit a Filing with a Fee and Make a Payment



1. Review the submitted filings After marking one or more reports for submission, the

corresponding filings appear in the Guardianship -Payment and Submission screen. Verify that the correct filings appear.



2. Click OK



4. Enter the billing address In the billing address fields, enter the Address, City, State, and Zip Code.

This must match the exact billing address for your credit card or the payment may be denied.

6. Enter an email address

All correspondence regarding the submission of the filing, including payment confirmation, will be sent to the e-mail address provided.

How to Submit a Filing with a Fee and Make a Payment



Enter the credit card number without any dashes or spaces, the three- or four-digit CVV security code, and expiration date in the Email appropriate fields. The CVV code is a three-digit number on the back of the card next to the signature line on Visa, MasterCard, or Discover cards or a four-digit number that is printed (not embossed) on the front-right corner of American Express cards. 10. Agree to the terms and conditions You may click the link to review the details of the agreements. Report Information Case File No. Caption 12. (Optional) Click OC-10101the **PRINT** Goodman, an 2022 button to generate a printable version of the receipt page. Payor Information

8. Enter your credit card details



9. Verify the billing address

The information appearing in the Billing Address section is based on the details recorded in the PAePay Checkout screen. If any information is incorrect, your payment may be declined. Close the screen using the "X" in the upper right corner. Your reports are saved. Update your information in the PAePay Checkout screen and submit your reports again.

11. Click the PAY button


Miscellaneous



GTS Guardian 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

G	TS Das	hboard										C Help
Th inv	e Guardianshi entory and an	p Tracking Sys nual reports.	stem Dashboard p	rovides users a	access to cases	in which the	ey are ai	active cas	e participant a	and the ability to	o view, e	dit and submit their
U	pcoming and	Overdue Repo	orts (29)									
C	Quick access t	o upcoming inv	ventory reports, ini	tial/annual/fina	al reports that are	e due or ma	y be ove	rdue.				
										🗎 👗		More Actions
	Case File No.	County	Caption		·	Report	Status	Due				Notifications 4
	134-2019	York	Guardianship of R	Ruel, Lou, an Ind	capacitated Perso	n Person	Draft	6/7/2022 (overdue)	12 days			Organization Profile:
	772-2018	York	Guardianship of K Person	(imbell, Lenny, a	an Incapacitated	Inventory	New	6/10/2022 overdue)	(20 days	Ð		Windsor Guardians
U	162-2019	York	Guardianship of D Resson)awg, Lenny, an	Incapacitated	Person	New	6/10/2022	(26 days	•		
												Recent News
A	ctive Cases (1	<u>17)</u> 2										Latest GTS News
E	asy access fo	access for Guardians, Attorneys and interested parties to all cases in which they are an active case participant:							Updated: 9/13/2022			
		▼								T	(Need technical assistance?
	Case File No.	County	Caption	Guardian(s) At	Attorney(s)	Filing Date	Adjudication Date St		Status			Call the GTS Help Desk at: 1-877-227-2672 or send an
	OC-1201- 2019	York	Guardianship of Thorn, Winston, an Incapacitated Person	Windsor Guardians		08/08/2019		08/28/2019	Adjudicated Incapacitated	3 ★ €	1-877-227-2672 o e-mail to: <u>GTSAOPC@pacc</u> The Help Desk is Mondav-Fridav fr:	e-mail to: <u>GTSAOPC@pacourts.us</u> . The Help Desk is available Mondav-Friday from
	OC-43-2019	York	Guardianship of Harris, Yolanda, an Incapacitated Person	Windsor Guardians		08/02/2019		08/09/2019	Adjudicated Incapacitated			8:00am-4:30pm EST. Please note that the Help Desk is unable to provide legal assistance or take
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How to Access Case Details



1. Access the Case Details screen In the Active Cases tab on your Dashboard, click on the View Case Details icon for the appropriate case.



Current Age

Appointment Date

92

2. Click on the tab needed

On the GTS Case screen, the information is organized into tabs on the left-hand side. Click a tab to access the available details.

Date Of Birt

09/14/1930

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

The tabs of the Case Details screen can be used as follows:

Incapacitated Person

Other Case Participants

Case Actions

Guardians

Attorneys

Reports Bond Ordered

• Incapacitated Person – Displays basic details about the person that is the subject of the case.

Person Info

Age At Petition

Representatives

89

- Case Actions Lists all actions that have occurred on the case and provides access to case documents.
- Guardians Lists the guardians that have been requested or appointed for the incapacitated person.
- Other Case Participants Lists all interested parties and their relationship to the incapacitated person.
- Attorneys Displays the attorneys for the incapacitated person, guardians, and any other parties on the case.
- **Reports** Displays a history of submitted reports. Provides the ability to begin new reports, continue reports in progress, add reports that are ready for submission to the shopping cart, delete a draft of a report, amend reports that were accepted by the court, and edit reports that were returned for correction.
- Bond Ordered Displays the details of any bonds that have been associated to the case.



How to Add Trainings and Certifications



How to Add Trainings and Certifications





training Repeat Steps 7 – 11 for additional trainings. Pennsylvania's Unified Judicial System Web Portal

How to Assign Organizational Proxy Rights

Manage Organization - Search

Add Organization User

Search By: Name

* First Name: Dominic

* City: Anytown

* State: Pennsylvania

Search

* Last Name: Fuller



1. Open the Manage Organizations screen Hover over the My Services menu and click the 'Manage Organizations' option.



3. Access an organization Identify the organization you want to add the prospective proxy to and click the Edit Record icon.

5. Select a Search Type In the Add Organization User popup, click on the Search Type

dropdown and select 'Name or 'PA Bar ID'.

Use the 'Name' option to find an attorney or nonattorney. The 'PA Bar ID' search only applies to attorneys and is only useful when you know their bar number.

You can only search for individuals who have a UJS Web Portal account.

7. Click SEARCH

θ Organization Name Guardian Angels θ Organization Users Date Added Account Name User Name Email Address es Proxy Rights Create atstestuser-Reports 05/01/2018 P III mikeerdman Frdman Mike joeguardian7@yahoo.c/ Submit Reports Create Reports 08/30/2018 P III dantest11 Schweier, Daniel Daniel.Schweier@pac Submit Reports

Organization Name: Guardian Angels

Search

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2. (Optional) Search for the organization

On the Manage Organization – Search screen, enter the name of the organization in the **Organization Name** field and click the SEARCH button.

4. Access the Add Organization User screen On the Manage

Organization screen, click the Add New Record icon above the Organization Users grid.

6. Enter your search criteria Depending on the

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selected search type, enter the required information related to the prospective proxy

When prompted to enter a **City**, enter the city where the proxy works.

How to Assign Organizational Proxy Rights





12. Click SUBMIT

Access Management User – Provides the authority to administer the privileges of all proxies in the organization. This
privilege designates an individual as an AMU.

Submit

- Create Reports Provides the authority to complete new reports on behalf of the organization. This does not grant the
 right to submit these reports.
- **Submit Reports** Provides the authority to complete, submit and, when necessary, pay for the filing of a report. This includes reports filled out by any other proxy in the organization.

How to Create Your UJS web Portal Account

1. Access the UJS Web Portal In the address bar of your internet browser, enter https://ujsportal. pacourts.us and press the [ENTER] key.

Any individuals who already have a UJS Web Portal account for the use of Attorney Registration or PACFile can use the same account for GTS.

3. Create a username

On the Register New Account screen, enter a username of your choosing. It must be at least three characters long.

Usernames cannot be duplicated. You will be notified after Step 5 if you chose one that's already in use.

The E-Mail

Address field should contain your personal or work e-mail address for the receipt of GTS notices. The Alternate E-Mail Address field is only used in the username or password recovery process, which asks you to provide your primary or alternate email address.





2. Start the account registration process On the UJS Web Portal homepage, click the *Create New Account* link in the upper-right corner of the screen.



How to Create Your UJS Web Portal Account



6. Confirm your email address An e-mail from administrator@ pacourts.us will be sent to the address you provided. You need to access your e-mail account and click on the link the e-mail contains.

Tip You should receive this e-mail within 15 minutes. Check your Junk or Spam folders if it does not appear within that time.

8. Open the Login page In the Verification Complete screen, click the *click here* link.

10. Open the **Request Role** screen In the Manage Account screen, click on the Add New Record icon above the Roles grid.

Tip If this screen does not appear after completing Step 9, hover over the User Options Menu icon 🛄 in the upper-right of the page and click 'Manage My Account'.

administrator@pacourts.us to me 🖃

UJS Portal E-Mail Address Validation

Your request to the UJS Portal with the following e-mail address, <u>ebkane87@gmail.com</u> needs to be validated. If you requested access to the UJS Portal, please click the link below to verify your e-mail address. Otherwise, please ignore this e-mail.

4:24 PM (0 minutes ago) ☆

http://ujsportaltest.pacourts.us/RegisterEMailValidation.aspx?registrationRequestID=05a1fc54-9ae4-4ada-aa27-9a822a32e43f

Need help with the UJS Portal? Visit our Help Center.

Complete your Registration Password: Confirm Password: Your password must be 10 characters long and contain at least three of the following: one uppercase letter, one lowercase letter, one number, one special character (ex. !@#\$%^&*) Submit

Verification Complete

Registration has been completed. Please click here to login.



7. Create your password

On the Complete your Registration screen, enter a password and then confirm it by entering it again.

Click the SUBMIT button.

You can choose your new password, but it must meet the requirements specified onscreen.

9. Login with your new account In the Account Login screen, enter the username and password you just

created and click the LOGIN button.



11. Enter your guardian or interested party role In the Request Role screen, click on the Request Role Role dropdown and * Role: Guardianship Case Participant ~ select 'Guardianship * User Access Code: cc7D48T Case Participant.' Submit If you have not received your user access code letter from the court, your role cannot be added until it is obtained. 13. Click SUBMIT Steps 14-17 are optional and only apply to individuals working for guardianship organizations. Organizations Date Added Has Organization Name If this does not apply to you, congratulations, you've completed this process. **15. Search for your** organization Request Organization In the Request Organization popup Name: guardian care screen, use the State: Pennsylvania ~ Name, State, and City: Mechanicsburg City fields to identify Search the organization you work for. Organization Name Organization City Guardian Care Mechanicsburg 17. Select the Submit organization Select the checkbox appearing to the left of your organization.

12. Enter your access code Enter the access code provided in the letter from the County Orphans' Court.

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Tip If you receive a new access code and have not requested one, contact the county that sent the new code immediately. You may not be able to access all vour cases until the error is corrected.

14. (Optional) Add your professional organization

In the Manage Account screen, click the Add New Record icon above the Organizations grid.

16. Click SEARCH

Tip If the organization is not found, repeat Step 15 using different information for the search.

18. Click SUBMIT Congratulations! You've completed this process.

END

Tip



Pennsylvania's Unified Judicial System Web Portal

How to Apply an Access Code to Your UJS Web Portal Account



1. Click the Login link

Tip If you are already logged onto the Portal, skip to Step 3.



Account Login		
Enter your User Name and	Password as provided by AOPC. I	Password is case sensitive.
User Name: eb	Kaneo/	•
* Password: •••	•••••	
	Login Cancel Forgot my username Forgot my password Create a new user account	

screen, enter your username and password and click the LOGIN button.

2. Enter your login credentials In the Account Login

reasons, if you previously had access to the GTS under a different access code, the GTS will be unavailable until you successfully enter your new code.

3. Open your account settings Hover your mouse pointer over the User Options Menu icon and click on 'Manage My Account.'

	You are logged on as: ebkane87
AL YLVANIA	Unified Ju Unified Ju Change My Account Change My Account UJS Form PAePay® Logout Collections in the Courts Financial Records

How to Apply an Access Code to Your UJS Web Portal Account



4. Access your role information In the Manage Account screen, click the Add New Record icon above the Roles grid.

- 0.	ser Name: ebkane87		
^ F	rst Name: Elizabeth		
Mid	dle Name:		
*L	ast Name: Kane		
Na	me Suffix:	~	
* Address	Location: United States	~	
* Addre	ss Line 1: 105 W. Main St.		
Addre	ss Line 2:		
	* City: Mechanicsburg		
	* State: Pennsylvania	~	
*	Zip Code: 17055		
* Phone	e Number: (717) <u>555-1534</u>		
Phone Number	Extension:		
* Ema	I Address: ebkane87@gmail.com		
* Confirm	Address: ebkane87@gmail.com		
Alternate Ema	I Address: ebkane87@gmail.com		
Password	s Expired: 🗌		
	Submit		
Roles Role Name Reference Nu	nber Status Date Add	ed	
	No results found		
			5. Enter your
		,	guardianshi
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		×	In the Request Ro
quest Role		^	Popup , click off the
t Data Ou	andianakia Ossa Dartisianat		select 'Guardians
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			- 7. Click SUBM
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The The	Unified JUDICIAL		
SYS	TEM of PENNSYI	VANIA	

6. Enter your access code Enter the new access code provided in the letter from the Orphans' Court.

The Guardianship link, which opens the GTS, may not appear immediately after clicking SUBMIT in the previous step. Click the Home link in the menu bar to display the Guardianship link.

Case Information

Guardianship

PACF

Home





Need Additional Help?

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

or

GTSAOPC@pacourts.us

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

