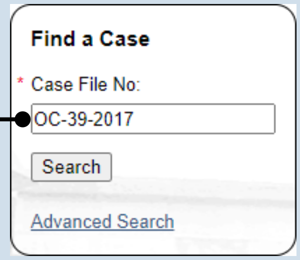
How to Add a Participant to an Existing Case

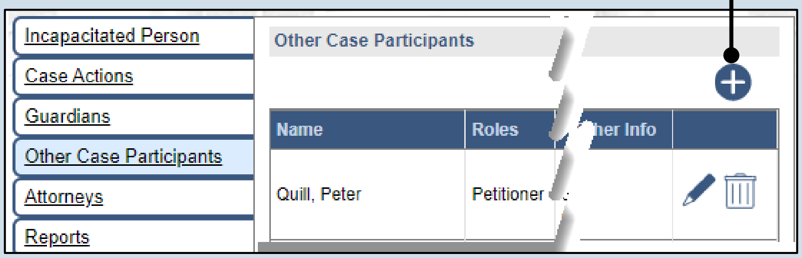
1. Search for the case

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



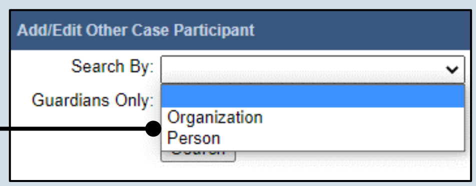
2. Access the Search Participants screen

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.

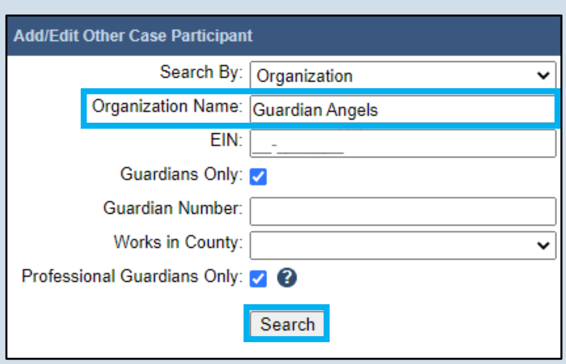


4. Enter the participant's name and any available identifiers

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

Search by Person

Search by Organization



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

4. Click SEARCH

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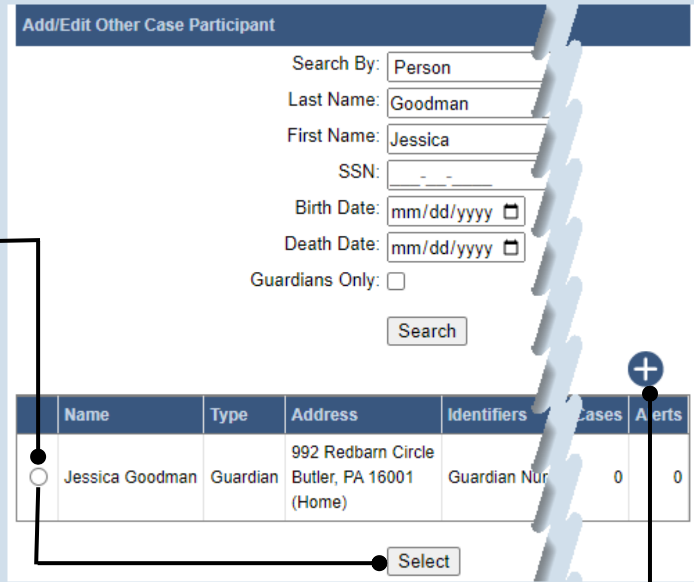
5. Choose an existing participant or start creating a new participant record

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.

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.



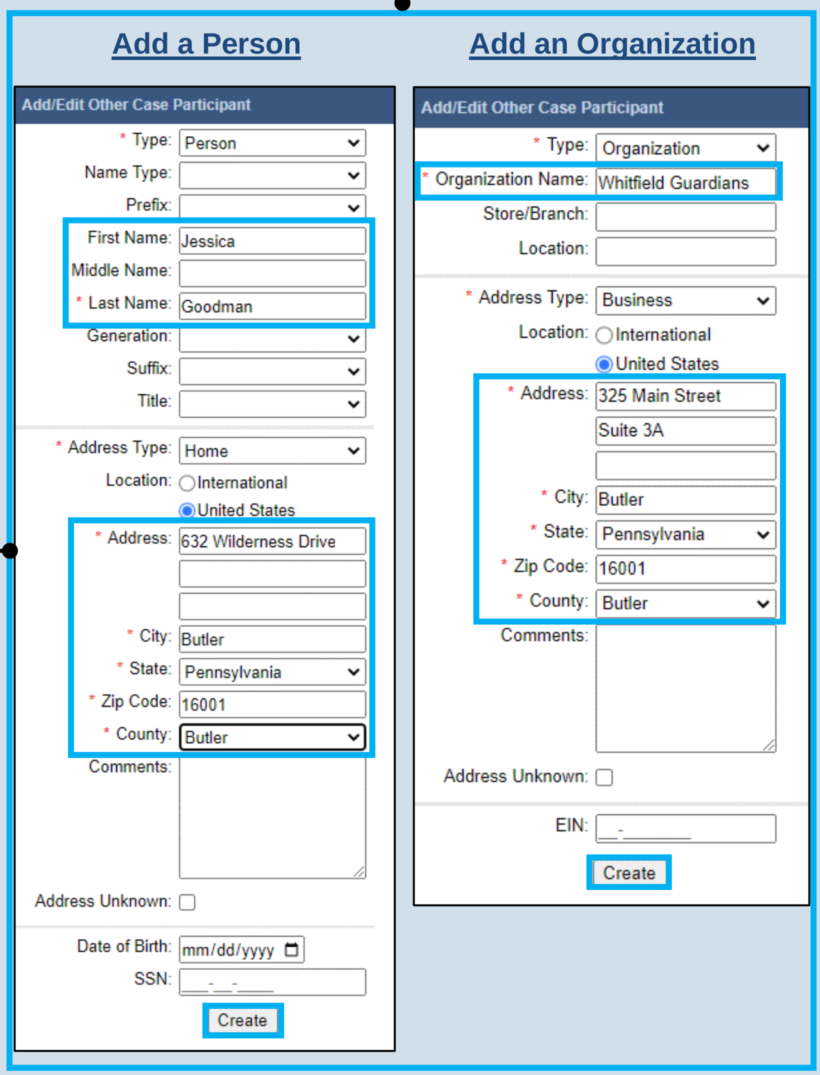
6. Verify the participant's name information

In the Search Participants popup, verify the **First Name** and **Last Name** or **Organization Name** fields are correct.

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.



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

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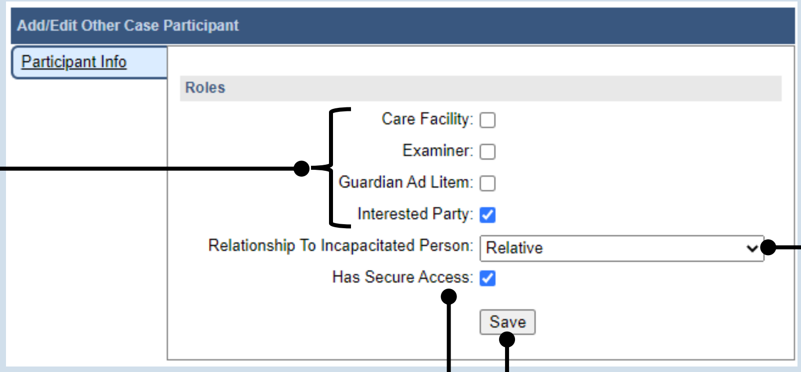

10. Indicate the role of the participant

Select the appropriate Role checkbox that best describes the participant's relationship to the case.

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

END