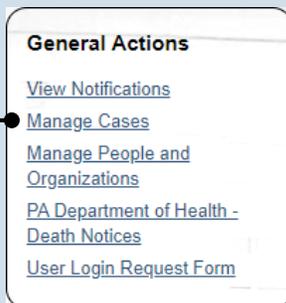




# How to Create a Case

## 1. Open the Guardian Case Search screen

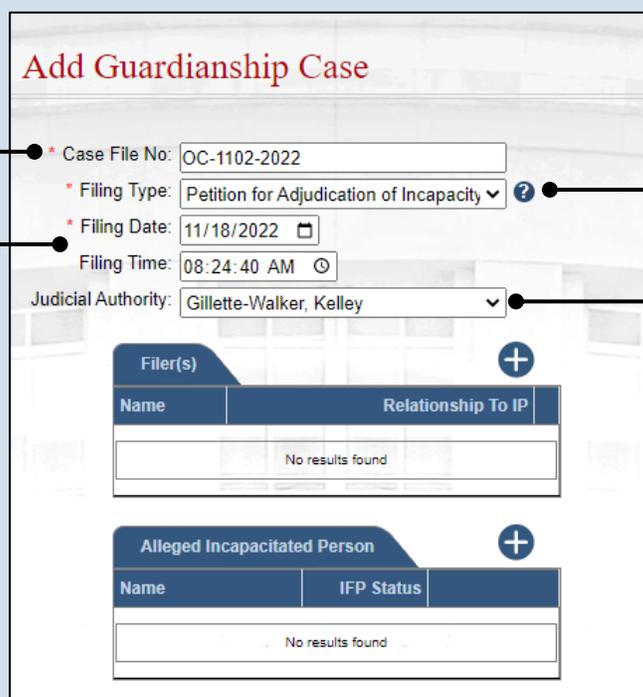
Click on the Manage Cases link appearing in the General Actions section of your Dashboard.



## 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.

## 18. Select a participant type

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

## 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**.

Add/Edit Case Participant	
Search By:	Person
Last Name:	Witt
First Name:	Ethel
SSN:	
Birth Date:	12/07/1937
Death Date:	mm/dd/yyyy
Guardians Only:	<input type="checkbox"/>
Search	

## 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 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 an Organization**

## 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	

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

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

## 45. Save your changes and create the case

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