



GUARDIANSHIP
TRACKING SYSTEM



Reference Guides

Guardian Edition

<https://ujportal.pacourts.us>

Version 12



Introduction

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

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

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

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

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

Table of Contents

Working with Reports

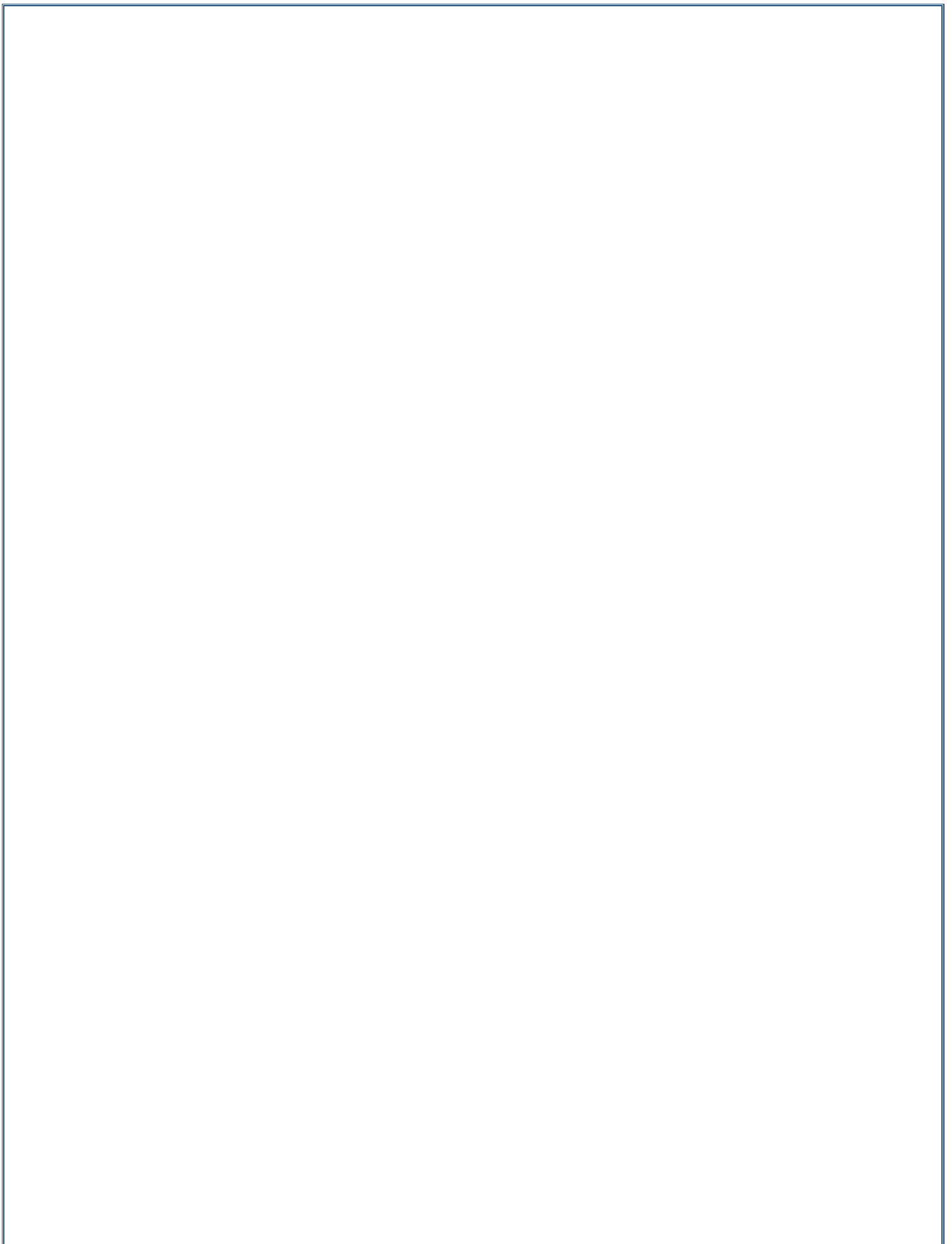
How to Complete an Inventory Report	3
How to Complete a Guardian of the Estate Report	19
How to Complete a Guardian of the Person Report	45
How to Amend a Submitted Report	61
How to Resubmit a Filing that was Returned for Correction	63

Submission & Payment

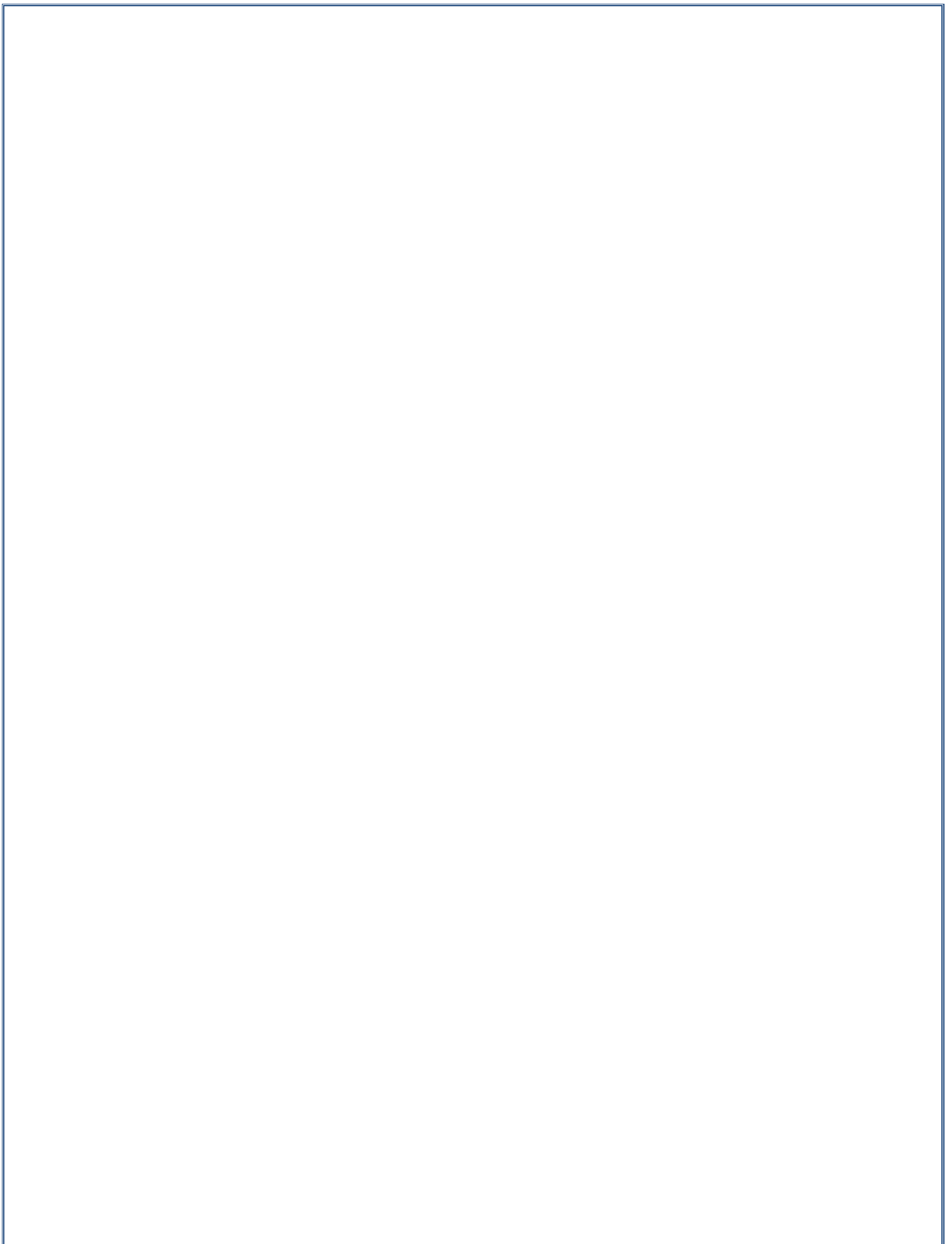
How to Submit a Report with a Fee and Make a Payment	67
How to Submit Multiple Reports simultaneously	69

Miscellaneous

The GTS Dashboard Quick Sheet	73
How to Access Case Details	75
How to Add Training or Certifications to your GTS Profile	77
How to Assign Organizational Proxy Rights	79
How to Create Your UJS Web Portal Account	81
How to Apply an Access Code to an existing UJS Web Portal account	85



Working with Reports





How to Complete an Inventory Report

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).

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.

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.

4. Click the Add Asset icon

How to Complete an Inventory Report



5. 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.

7. 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.

9. Part II, #1 (cont.): Add other assets

Repeat Steps 4-8 for all the IP's assets.

PART II. ASSETS (PRINCIPAL)

1. List all bank accounts, real estate and other personal property below. If the property is owned owner(s) in the 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	
Personal			765	
Burial Acc	Members 1st Cred		1323	
			SubTotal:	
			2088	

6. Part II, #1: (cont.): Description

Click in the **Asset Description** field and briefly summarize the asset.

8. Part II, #1: (cont.): Value

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

How to Complete an Inventory Report



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.

Tip 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

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.

How to Complete an Inventory Report



14. 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 15.

If you selected 'No', proceed to Step 16.

Tip Real property includes any land and any structures on that land.

16. Part II, #3b: *Coverage Period*

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

18. Part II, #4a: *Carrier*

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

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: 02/20/2022

Homeowner's Insurance Coverage End: 02/20/2023

Copy of policy to be provided upon request.

15. Part II, #3a: *Carrier*

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

17. 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 18.

If you selected 'No', proceed to Step 20.

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

* Automobile Insurance: Yes

a. Automobile Insurance Carrier: Nationwide Insurance

b. Automobile Insurance Coverage Start: 07/20/2022

Automobile Insurance Coverage End: 02/20/2023

Copy of policy to be provided upon request.

19. Part II, #4b: *Coverage Period*

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

How to Complete an Inventory Report



20. 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 24.

If you selected 'Yes, in sole name', proceed to Step 22.

If you selected 'Yes, in joint name(s)', continue to Step 21.

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

* Safe Deposit Box: Yes, in joint name(s) [v]

* Joint name(s): Cameron Boggs [x]

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

* b. Are there plans to inventory the contents?: Yes [v]

21. 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.

22. 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.

23. 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.

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

If the IP received income during the reporting period, click on the dropdown and select 'Yes', and continue to Step 25.

If not, click on the dropdown and select 'No' and proceed 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?: Yes [v]

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

Income Source Type	Income Description	Income Amount	
SubTotal:			

How to Complete an Inventory Report



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

27. 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.

26. 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.

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

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 (Retir		11432	
		SubTotal:	
			11432

29. Part IV, #1: Liability/debt?
If the IP has any outstanding liabilities or debts, click on the dropdown and select 'Yes', and continue to Step 30.

If not, click on the dropdown and select 'No' and proceed to Step 35.

28. Part III, #1 (cont.): Add other income
Repeat Steps 25-27 for any additional sources of income for the IP.

PART IV. LIABILITIES/DEBTS

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

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

Liability/Debt	Lender	Value	
		SubTotal:	

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

How to Complete an Inventory Report



31. 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.).

32. Part IV, #1

(cont.): *Lender*

Click in the **Lender** field and enter the name of the person or organization to whom the debt is owed.

PART IV. LIABILITIES/DEBTS

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

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

Liability/Debt	Lender	Value	
<input type="text" value="Credit Card"/>	<input type="text" value="Visa"/>	<input type="text" value="1211"/>	
			SubTotal:
			<input type="text" value="1211"/>

33. Part IV, #1

(cont.): *Value*

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.

How to Complete an Inventory Report



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.

Tip A guardianship surety bond can be required for the person(s) responsible for handling the fiduciary duties of an 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.

Tip 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 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 this 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 this page.

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.

How to Complete an Inventory Report



38. 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 39.

If you selected 'No' or 'N/A – The Incapacitated Person is already in a supervised residential setting', proceed to Step **Error! Reference source not found.**

39. 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.

40. 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 (not pictured).

How to Complete an Inventory Report



41. 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 facility, etc.).

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

If you selected 'No' or 'N/A – The Incapacitated Person is already in a supervised residential setting', proceed to Step 45.

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

* Impending Relocation to supervised residential setting?: Yes

* a. Supervised Residential Setting Type: Assisted Living Facility

* b. Supervised Residential Setting Steps: Reviewing a list of assisted living recommendations from IP's healthcare facility. Preparing a list of likes and dislikes in preparation for a final

3. Incapacitated Person's Current Residence

* Address Type:

* Address Line 1: 111 Elm St.

Address Line 2:

* City: Sandy Ridge

* State: Pennsylvania

* Zip Code: 16677

42. 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.

43. Part VI, #2b: *Explanation*

Summarize the steps, whether completed or not, that are being taken to move the IP to the supervised residential setting.

44. Part VI, #3: IP's *Residence*

Enter the IP's current address.

How to Complete an Inventory Report



45. Part VII, #1b: Annual expenses

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

Tip 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 inventory or most recent amended inventory

a. Total Annual Income:	11432	Note: This is a co
* b. Annual Estimated Expenses:	12327	
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 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 (SSI)		05/17/2022

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 417 Maple Ave Sandy Ridge, PA 16677 and guardian Cameron Boggs is in charge of the maintenance of the property and any

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.

Tip 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.

How to Complete an Inventory Report



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.

5. Prior to the appointment of a guardian, has an agent under a Power of Attorney been served?
* Prior Power of Attorney: Yes

* If yes, has an accounting ever been requested or filed with the Orphans' Court?: Yes

* If yes, was the agent the same person as the guardian?: Yes

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.

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 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 57.

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

PART VIII: MEDICAL INFORMATION

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

2. When still capacitated, did the Incapacitated Person execute a durable power of attorney or a mental health care power of attorney?
* Durable Health Care Power of Attorney: Yes

* Authorized Health Care Agent: Cameron Boggs

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

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

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

Tip For more information on durable power of attorneys or a POLST, 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.

How to Complete an Inventory Report



58. Part VIII, #3:

Funeral & burial

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

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

If you selected 'No', proceed to Step 62.

60. 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.

62. Co-guardians?

If there is more than one guardian named on this report under Part I, Question #1, continue to Step 63.

Otherwise, proceed to Step 64.

59. Part VIII, #3

(cont.):

Explanation

Summarize what you know about the IP's will, trust, and/or their funeral and burial wishes.

61. Part VIII, #3

(cont.): Value of burial account

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

63. 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 selected Yes, you must enter a home, business, or cell phone number and an e-mail address for each co-guardian.

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

How to Complete an Inventory Report



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.

Tip 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.

65. (Optional) Signature and Affirmation (cont.): Comments

If you have any additional information that you want to provide to the court about the guardianship, enter them in the comments field provided.

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 ?
11/28/2022	/s/ Cameron Boggs	Cameron Boggs	Unit	341 Lincoln Ave.			Sar	F	16677				

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

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

If you have supplemental documents that you want to submit to the court, particularly if you answered 'Yes' in Step 37, click the Upload Document icon, and then the CHOOSE FILE button. Continue to Step 67.

If you have no documents to upload, proceed to Step 68.

Document Name	File
	Choose File No file chosen

67. Signature and Affirmation (cont.): Documents

In the popup screen, 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.

Open

This PC

Search New folder

Organize New folder

Name	Date modified	Type	Size
Home Owners Policy	7/18/2022 11:12 AM	Adobe Acrobat D...	

File name: Home Owners Policy

All Files (*.*)

Open Cancel



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.

Tip A copy of the notice of filing form can be obtained at <http://www.pacourts.us/forms/for-the-public/orphans-court-forms>. 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 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.

Next Action: Save

Save and Close

Ready for Submission

Submit

Ok Cancel View Draft

69. File now or later?

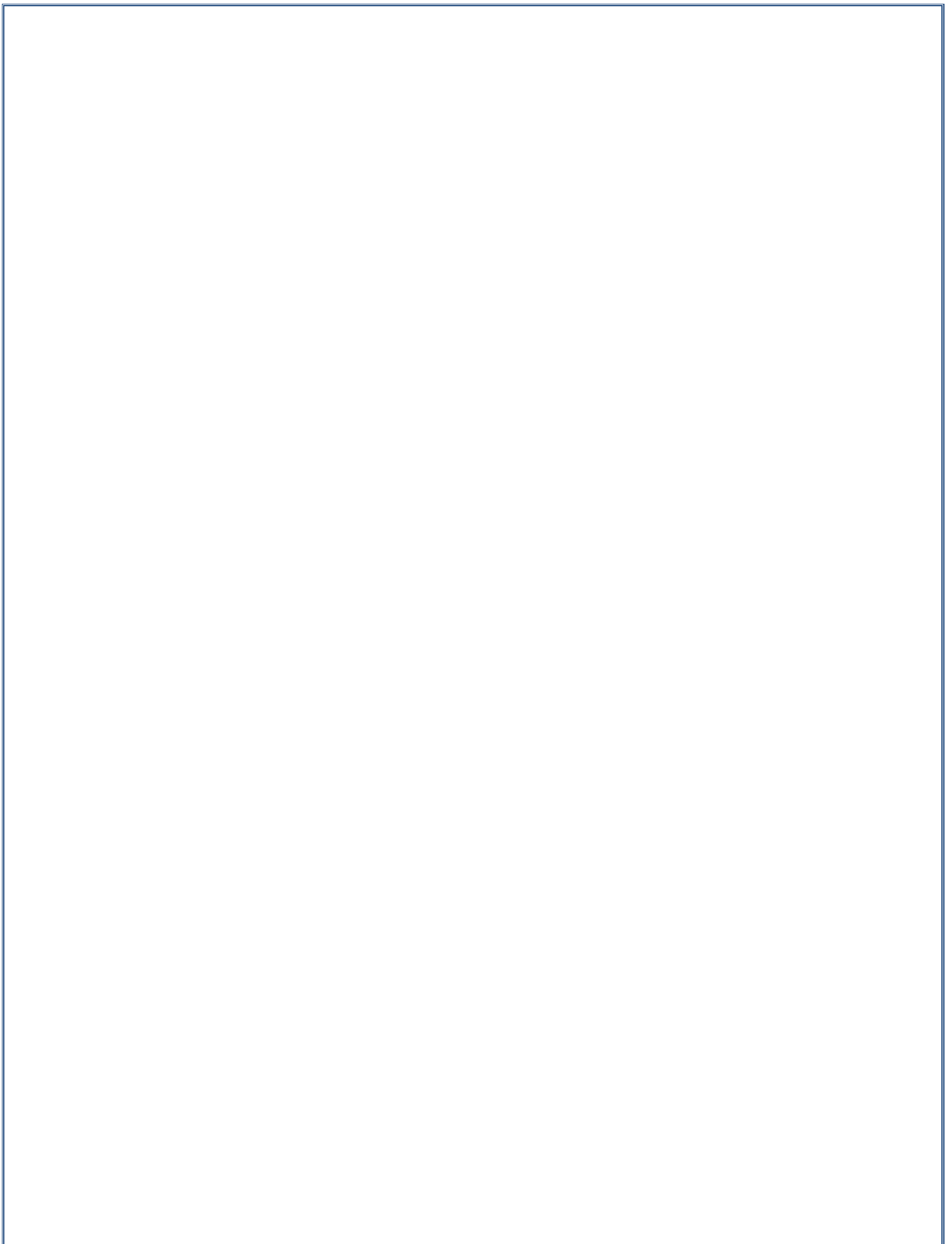
Choose one of the following and click OK:

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.

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).

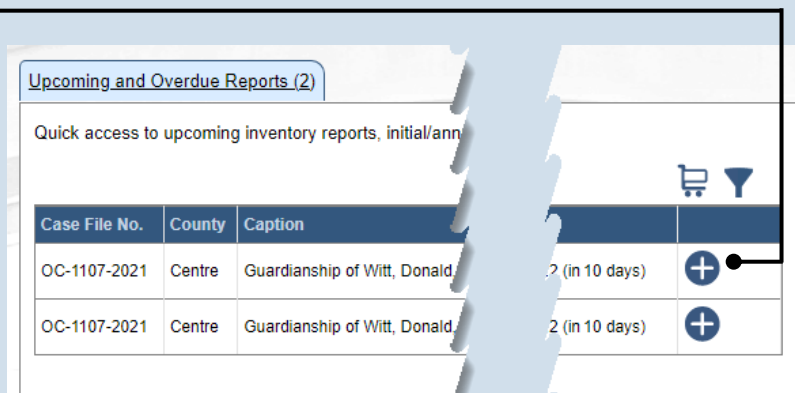




How to Complete a Guardian of the Estate Report

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 Estate

Estate of Witt, Donald, an Incapacitated Person
Date of Birth: 10/10/1941
Case File No. OC-1107-2021
DATE COURT APPOINTED YOU AS GUARDIAN: 10/5/2021

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

3. Part I, #3: Report Type

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

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

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

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

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

How to Complete a Guardian of the Estate Report



4. Part II, Did the IP receive income?

If the IP received income during the reporting period and you want to itemize the individual sources, select 'Yes' and proceed to Step 5.

Otherwise, select 'No' from the dropdown and continue to Step 9.

6. 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.

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

Repeat Steps 5-7 for any additional sources of income for the IP.

Income Source Type	Income Description	Income Amount	
Social Security Benefits (Retir		11432	
			SubTotal:
			11432

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

7. 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.

How to Complete a Guardian of the Estate Report



9. 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'. Continue to Step 10.

Otherwise, select 'No' from the dropdown and proceed to Step 15.

11. Part III, #1 (cont.): Expense

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

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

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

Expense	Payee	Expense Description	Expense Amount	
Medicine	Pharmacy		750	
Food	Grocery Stores		6100	
Clothing	Department Store		1500	
			SubTotal:	8350

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

12. Part III, #1 (cont.): Payee
Click in the **Payee** field and enter the person or organization to whom the money was paid.

14. Part III, #1 (cont.): Add other expenses
Repeat Steps 10-13 for any additional expenses paid for from the IP's income or estate.

How to Complete a Guardian of the Estate Report



15. 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 16.

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

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?): 1021

16. 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.

17. 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: 100

18. Part IV, #2

(cont.): 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 can be found in Part IV, Question #5 of last year's Guardian of the Estate report.

Tip 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.

How to Complete a Guardian of the Estate Report



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.

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

6. Is PRINCIPAL SPENT greater than \$0

Principal Spent: Yes

* Invasion of Principal Order: Yes

Invasion of Principal Order Date: 06/07/2022

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.

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: Yes

* Invasion of Principal Order: No

* Invasion of Principal Explanation: The decree of adjudication of incapacity provided the guardian limited permission to spend principal if a situation should arise where it

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.

PART V. ASSETS

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

* Inventory Asset: 139088

Note: This is a computed field.

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.



23. Part V, #2: Additional assets?

If the IP obtained no additional assets during the reporting period, and a complete asset list appears under Question #3, select 'No' from the dropdown and proceed to Step 29.

If the IP has additional assets, not listed under Question #3, that were found or received during the reporting period, select 'Yes' from the dropdown and continue to Step 24.

If the IP has assets, but none are listed under Question #3, then you must record all assets regardless of the year in which they were received. Select 'Yes' from the dropdown and continue to Step 24.

Asset Type	Description/Source	Value	
Investments (Stocks, Bonds, M...	Bonds	976	
		SubTotal:	
		976.00	

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

25. 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.

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

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

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

Click in the **Description/Source** field and briefly summarize the asset.

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

Repeat Steps 24-27 for all the IP's assets.

How to Complete a Guardian of the Estate Report



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.

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	
				SubTotal:	
				139088	

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.

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

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

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.

2. List any additional assets received during the Report Period? (for example: gifts, inheritance.)

* Enter additional asset details?: Yes

Asset Type	Description/Source	Value	
Cash and Cash Equivalents (ca)	Real Property Sale (H)	137000	
Investments (Stocks, Bonds, Mt)	Bonds	976	
		SubTotal:	
		137976.00	

32. Part V, #3 (cont.): Asset Type

Click on the **Asset Type** dropdown and select 'Cash and Cash Equivalents'.

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

33. Part V, #3 (cont.): Description/Source

Click in the **Description/Source** field and describe the item that was sold.

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

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

34. Part V, #3 (cont.): Value

Click in the **Value** field and enter the sale price in U.S. dollars.

How to Complete a Guardian of the Estate Report



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.

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	
				SubTotal:	
				139088	

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.

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.

Transfer Asset

Asset Type: Real Property

Description:

* Name of the third Party to whom asset was transferred to: Cameron Boggs

Relationship to the IP of the third party to whom asset was transferred: Grandson

* Value: 137000

* Was a court order obtained: Yes

* Court Order Date: 06/08/2022

Explanation: The property at 115 Maple Ave. Gettysb

Submit

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 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

How to Complete a Guardian of the Estate Report



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.

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

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

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	Home		765	
Real Property	House		Cameron Boggs	137000	
				SubTotal:	
				139088	

46. Part V, #3 (cont.): Update other locations

Repeat Steps 45 for any other asset locations that need to be added or updated.

How to Complete a Guardian of the Estate Report



47. 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 48.

If you selected 'No', proceed to Step 57.

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

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

49. 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.

51. 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.

50. 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.

How to Complete a Guardian of the Estate Report



52. 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.

54. 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 56.

56. Part V, #4

(cont.): Add other properties

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

During the Report Period, what was the sale price?	Was a court order obtained if property was purchased or sold?	Court Order Date	Explanation
<input type="text" value="137000"/>	<input type="text" value="Yes"/>	<input type="text" value="07/21/2022"/>	

53. 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 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.

How to Complete a Guardian of the Estate Report



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.

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.

58. Part VI, #1: Click the **Add Compensation** icon

Guardian Name	Amount	Fee Frequency	If Hourly, # of Hours
Cameron Boggs	500	Annual	

59. Part VI, #1

(cont.): 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.

How to Complete a Guardian of the Estate Report



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.

2. Was the compensation approved by the court?

* Guardian Compensation Approved: Yes

* Guardian Compensation Order Date: 07/20/2022

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.

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.

2. Was the compensation approved by the court?

* Guardian Compensation Approved: No

* Guardian Compensation Explanation:

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.

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.

Tip 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.

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

How to Complete a Guardian of the Estate Report



67. 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 68.

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

69. 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.

71. 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.

Diagram illustrating the form for Part VII, #1. A line connects the instruction for Step 67 to the 'Attorney Compensation' dropdown menu. Another line connects the instruction for Step 68 to the '+ Add Attorney Fee' icon. A third line connects the instruction for Step 69 to the 'Name of Counsel' dropdown menu. A fourth line connects the instruction for Step 70 to the 'Rate vs. total fee' checkbox. A fifth line connects the instruction for Step 71 to the 'Rate' input field.

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

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

Select this checkbox if you have the number of hours the attorney worked on the case and their hourly rate.

If you selected this checkbox, continue to Step 71.

If you only have the total fee amount, leave this checkbox blank, and proceed to Step 73.

Diagram illustrating the form for Part VII, #1. A line connects the instruction for Step 72 to the 'Hours' input field.

72. 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 74.

How to Complete a Guardian of the Estate Report



73. 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.

75. 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/estate to pay the attorney fees. Proceed to Step 77.

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

Repeat Steps 68-76 for any other attorneys that received compensation during the reporting period.

Fee Amount	Rate	Hours	Was a court order obtained	Court Order Date	Explanation
2250			Yes	06/28/2022	

74. 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/estate. If 'Yes', continue to Step 75. If 'No', proceed to Step 76.

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

Click in the field (not pictured) and enter a summary that explains why court approval was not obtained to use the IP's income/estate to pay for attorney fees.

How to Complete a Guardian of the Estate Report



78. Part VIII, #1a:

SSA benefits

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

(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.

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 84.

If you selected 'No', continue to Step 83.

79. 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 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 fiduciary

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

How to Complete a Guardian of the Estate Report



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.

Tip 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.

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

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

Explanation

Click in the field (not pictured) and 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.

The screenshot shows the 'PART IX. SURETY INFORMATION' form with the following fields and callouts:

- 1. Was a surety bond required?**: A dropdown menu with 'Yes' selected. A callout line points to this dropdown.
- * Surety Bond Required:**: A dropdown menu with 'Yes' selected. A callout line points to this dropdown.
- Surety Bond Amount:**: A text input field containing '140000'. A callout line points to this field.
- Surety Bond In Effect:**: A dropdown menu with 'Yes' selected. A callout line points to this dropdown.
- Is the value of the estate at the end of the Report Period greater than the amount reported on the Inventory or last year's ending balance?:**: A dropdown menu with 'Yes' selected. A callout line points to this dropdown.
- * Has the amount of the surety bond been increased?:**: A dropdown menu with 'Yes' selected. A callout line points to this dropdown.
- To what amount?:**: A dropdown menu with '200000' selected. A callout line points to this dropdown.

85. 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.

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.

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.

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.

PART X. GUARDIAN INFORMATION

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

* Guardianship Training: Yes

If yes, provide the following information:

Participated In	Guardian Name	Training/Certification Start Date	Training/Certification Provider	Description

+

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

93. 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/renewed a guardianship certification.

If 'Yes', continue to Step 94.

If 'No', proceed to Step 102.

How to Complete a Guardian of the Estate Report



95. Part X, #1

(cont.): *Select an option*

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

97. Part X, #1

(cont.): *Training/certification date*

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

If you selected 'Training', continue to Step 98. If you selected 'Certification', proceed to Step 100.

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

99. Part X, #1

(cont.): *Description*

Click in the **Description** field and summarize the topics covered during the training.

Proceed to Step 101.

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

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.

Certification Type	Provider	Description
	AOPC	Participated in an online traini

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.

How to Complete a Guardian of the Estate Report



100. Part X, #1

(cont.):

Certification type

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

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

End Date	Certification Type	Provider	Description	
2/2022	National Certified Guardian (NCG) / Cer	National Certi		

101. Part X, #1

(cont.): *Add other trainings/ certifications*

Repeat Steps 94-100 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 must be entered separately.

102. 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', proceed to Step 107.

If 'Yes', continue to Step 103.

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

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

* Guardian Bankruptcy: Yes

If yes, provide the following information

Guardian Name	Description	
Cameron Boggs	Guardian filed for bankruptcy on 1/2	

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

104. 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.

105. Part X, #2 (cont.): *Description*

Click in the **Description** field and summarize the circumstances surrounding the judgment or bankruptcy.

How to Complete a Guardian of the Estate Report



106. Part X, #2

(cont.):

Add other judgments/
bankruptcies

Repeat Steps 103-105 if any co-guardians received a judgment or filed for bankruptcy.

108. Part X, #3

(cont.): Click the Add Guardian Criminal Charges icon

110. Part X, #3

(cont.):

Description

Click in the **Description** field and briefly summarize the nature of the 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	
Cameron Boggs	On 3/31/22, Cameron was charged	

107. 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', proceed to Step 112.

If 'Yes', continue to Step 108.

109. 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.

111. Part X, #3

(cont.): Add other charge

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

How to Complete a Guardian of the Estate Report



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.

If 'No', proceed to Step 117.

If 'Yes', continue to Step 113.

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	
Cameron Boggs	Continued service is no longer in the	

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

114. Part X, #4

(cont.): Name of guardian

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

115. Part X, #4 (cont.):

Description

Click in the **Description** field and briefly summarize why the selected guardian can no longer serve.

116. Part X, #4

(cont.): Add other reasons

Repeat Steps 113-115 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 IV of the Inventory Report)

Value of the assets reported on the Inventory: 139088

2. If this is not the first Report, state the Total Assets (principal) from the prior Report. (TOTAL from PART IV of the prior Report)

Prior Total Assets: 0

3. What was the total amount of Income received during the Report Period? (The amount from PART IV of the Inventory Report)

Net Income: 11532

4. What is the total amount of Expenses paid during the Report Period? (The amount from PART IV of the Inventory Report)

Total Expenses: 8350

5. What are the Total Assets remaining at the end of the Report Period? (The amount from PART IV of the Inventory Report)

Total Assets: 138323

6. What is the Unspent Income at the end of the Report Period? (The amount from PART IV of the Inventory Report)

Unspent Income: 3182

117. 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 or contact the court for assistance.

How to Complete a Guardian of the Estate Report



118. Co-guardians?

If there is more than one guardian named on this report under Part I, Question #1, continue to Step 119.

Otherwise, proceed to Step 120.

120. Signature and Affirmation

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

Tip 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 submit this report to the court. I hereby swear/affirm that the information is true and correct.

* Co-guardian consent: Yes No

119. Co-guardians (cont.):

Select the **Yes** or **No** radio button to state whether the report is being submitted with the consent of all guardians.

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

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 ?
11/30/2022	/s/ Cameron Boggs	Cameron Boggs	Unit	417 Maple Ave.			Sari	F	16677			Unit	(717) 555-5577

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

121. (Optional) Signature and Affirmation (cont.): Comments

If you have any additional information that you want to provide to the court about the guardianship, enter them in the comments field provided.

How to Complete a Guardian of the Estate Report



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

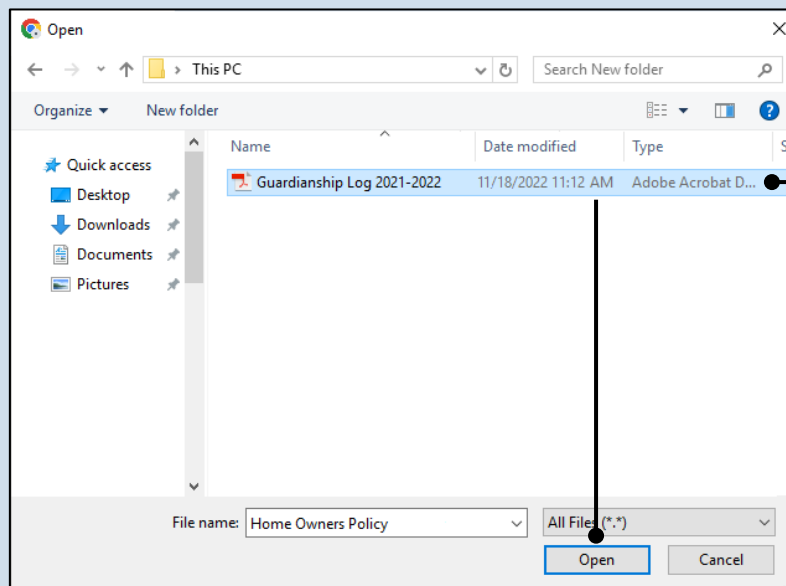
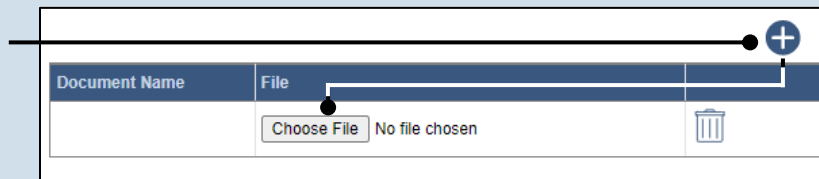
If you have supplemental documents that you want to submit to the court, particularly if you were prompted in Steps 66, 79, or 82, click the (Upload Document) link icon and continue to Step 123.

Otherwise, proceed to Step 124.

124. Signature and Affirmation (cont.): Checkboxes

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

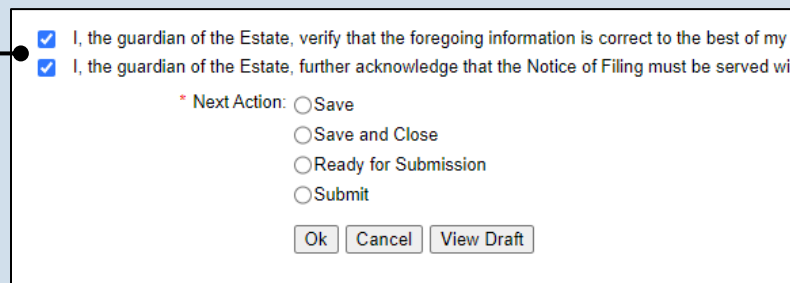
Tip A copy of the notice of filing form can be obtained at <http://www.pacourts.us/forms/for-the-public/orphans-court-forms>. This form cannot be served to the eligible recipients through the GTS. This must be completed through other delivery methods (ex. mail, fax, personal delivery, e-mail).



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.



How to Complete a Guardian of the Estate Report



125. File now or later?

Choose one of the following and click OK:

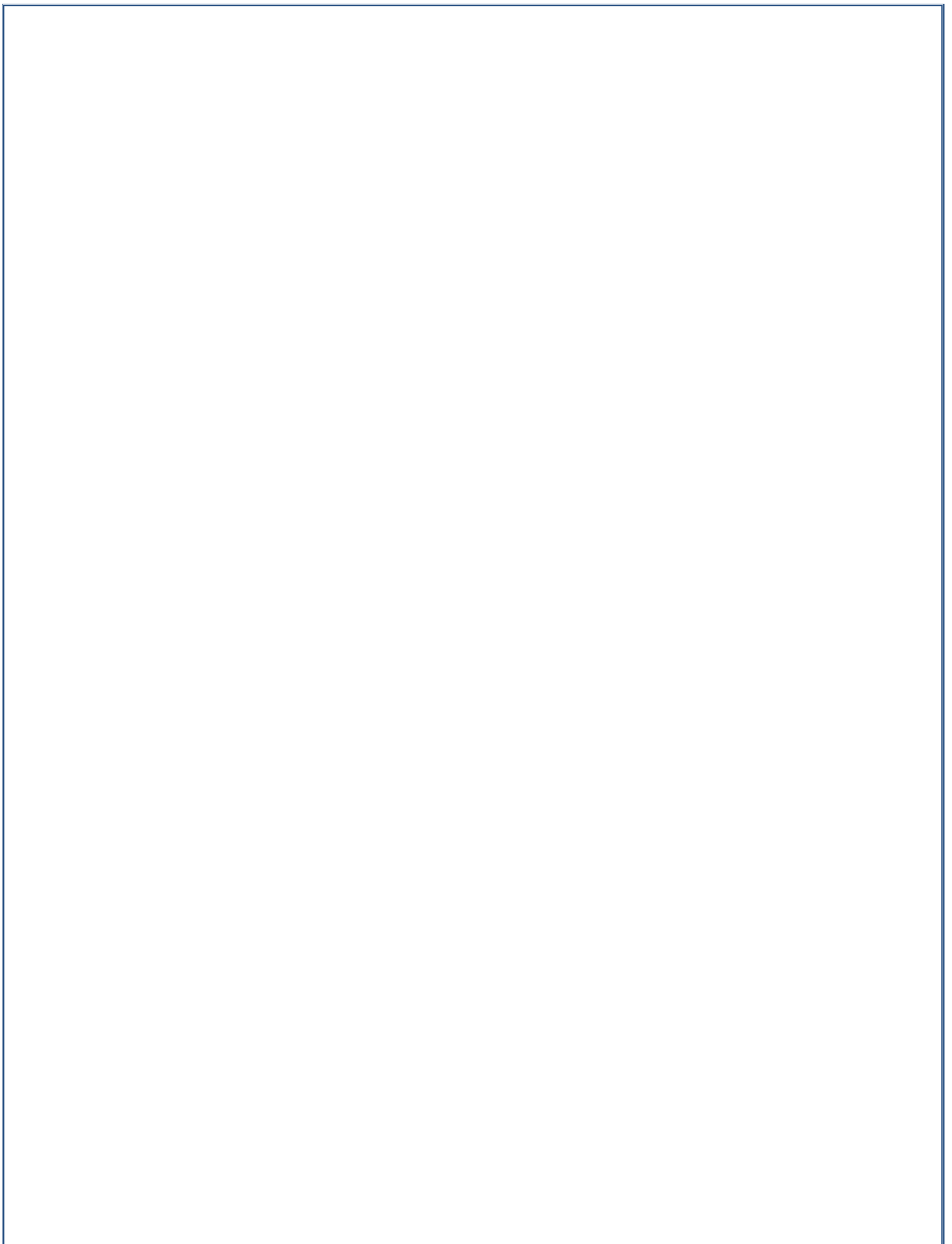
Option 1: If you want to submit this filing now, select the **Submit** radio button and, if payment is required, consult the *How to Submit a Filing with a Fee and make a Payment* reference guide. This button is only available to those with the authority to submit reports in GTS.

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).

A screenshot of a web application dialog box titled "Next Action:". The dialog contains two checked checkboxes at the top: "I, the guardian of the Estate, verify that the foregoing information is correct to the best of my knowledge" and "I, the guardian of the Estate, further acknowledge that the Notice of Filing must be served with the report". Below these is the "Next Action:" section with four radio button options: "Save", "Save and Close", "Ready for Submission", and "Submit". The "Submit" option is selected. At the bottom of the dialog are three buttons: "Ok", "Cancel", and "View Draft". A blue rectangular box highlights the "Save and Close", "Ready for Submission", and "Submit" radio buttons. A black line with a dot at the end points from the text "select the Submit radio button" in the Option 1 paragraph to the "Submit" radio button.

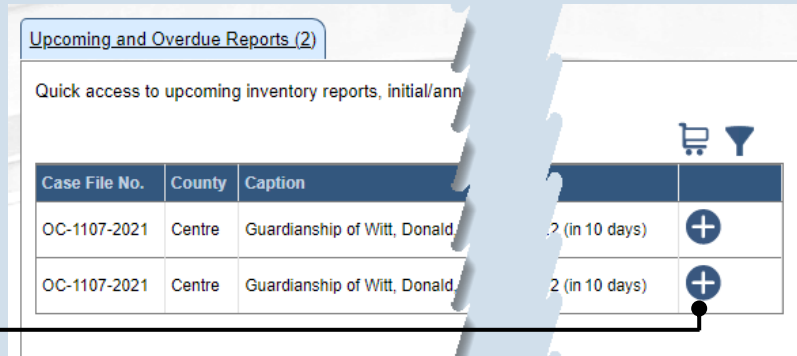




How to Complete a Guardian of the Person Report

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).



3. Part I, #3:

Report Period

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

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

COURT OF COMMON PLEAS OF
CENTRE COUNTY, PENNSYLVANIA
ORPHANS' COURT DIVISION

Report of Guardian of the Person

Estate of Witt, Donald, an Incapacitated Person
Date of Birth: 10/10/1941
Case File No. OC-1107-2021
DATE COURT APPOINTED YOU AS GUARDIAN: 10/5/2021

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

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.

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

How to Complete a Guardian of the Person Report



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

Verify or update the IP's date of birth.

PART II. PERSONAL INFORMATION ABOUT THE INCAPACITATED PERSON

1. Incapacitated Person's date of birth

Incapacitated Person's DOB: 10/10/1941

2. Incapacitated Person's Current Residence

* Address Line 1: 341 Lincoln Ave.

Address Line 2:

* City: Sandy Ridge

* State: Pennsylvania

* Zip Code: 16677

Facility Name (if any):

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

Verify or update the IP's current address.

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

IP'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 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

How to Complete a Guardian of the Person Report



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.

4. The Incapacitated Person has been in the residence noted in question 3 since

Residence Start: 2022

5. Has the Incapacitated Person moved during the Report Period?

Incapacitated Person Relocated: Yes

* Relocation Date: 05/06/2022

* Relocation Reason: IP can no longer live alone at their own I

* Previous residence/address: 115 Maple Ave. Gettysburg, PA 17325

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.

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.

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

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.

PART III. MEDICAL INFORMATION

1. List the medical professionals who have seen the Incapacitated Person during the Report Pe

Medical Professional Type	Description	Name	
Ear Doctor		Dr. Arianna Bloom	
Medical Doctor		Dr. Ronald Lefkowitz	

12. Part III, #1 (cont.): *Name*

Click in the **Name** field and enter the name of the doctor or medical professional.

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

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

How to Complete a Guardian of the Person Report



14. Part III, #2:

Medical/ psychiatric problems

List the major medical or psychiatric problems of the IP.

Tip These should only include problems diagnosed by a licensed professional.

16. Part III, #4:

Hospitalization

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

If you selected 'No', continue to Step 17.

If you selected 'Yes', use the **Date(s) of hospitalization** field to identify each instance. Continue to Step 17.

2. The major medical or psychiatric problems of the Incapacitated Person are as follows

Major medical or psychiatric problems: Dementia, Hiatal Hernia, Dermatitis, Soc

3. Describe any social, medical, psychological and support services the Incapacitated Person is receiving

Support services received: Socializes with staff and peers at day pr

4. Has the Incapacitated Person been hospitalized during the Report Period

* Incapacitated Person Hospitalized: Yes

Date(s) of hospitalization: 09/09/2022 - 09/15/2022

5. Has the Incapacitated Person received a mental health assessment during the Report Period?

* Incapacitated Person Mental Health Assessment: Yes

* Date(s) of MH Assessment: 12/14/2021

15. Part III, #3:

Services for the IP

Click in the field and enter any support services that the IP is receiving.

17. Part III, #5:

Mental health assessment

Click on the dropdown and select 'Yes' or 'No' to specify if the IP received a mental health assessment during the reporting period.

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

If you selected 'Yes', use the **Date(s) of MH Assessment** field to identify when it occurred. Continue to Step 18.

How to Complete a Guardian of the Person Report



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.

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

Tip '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.

The screenshot shows the 'PART IV. GUARDIAN'S OPINION' form. It contains three sections: 1. 'Should the guardianship be' with a dropdown menu set to 'Continued'. 2. 'Provide the reasons for your opinion. List specific recommended modifications' with a text field containing 'IP's dementia contributes to significant n'. 3. 'Have you filed a petition for modification or termination?' with a dropdown menu set to 'No'. A question mark icon is next to the dropdown. A large black line is drawn over the form, connecting the callout boxes to the corresponding fields.

19. Part IV, #2: *Explanation*

Use the field to list the reasons that support the recommendation you identified in Step 18.

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.

The screenshot shows the 'PART V. INFORMATION ABOUT THE GUARDIAN' form. It contains two sections: 1. 'On average, how often did you visit the Incapacitated Person during the Report Period?' with a dropdown menu set to 'I live with the Incapacitated Person'. 2. 'What is the average length of a visit?' with a dropdown menu set to 'Not Applicable'. A large black line is drawn over the form, connecting the callout boxes to the corresponding fields.

21. Part V, #1: *Visitation*

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

How to Complete a Guardian of the Person Report



23. Part V, #3: Guardianship log

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

Tip 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.

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

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

4. Guardianship Training/Certification

* Guardianship Training: Yes

Participated In	Guardian Name	Training/Certification Start Date	Training/Certification End Date
No results found			

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.

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

How to Complete a Guardian of the Person Report



26. Part V, #4

(cont.): *Select an activity*

Click on the **Participated In** dropdown and select 'Training' or 'Certification.'

28. 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 took place.

If you selected 'Training', continue to Step 29. If you selected 'Certification', proceed to Step 31.

Tip If you only want to specify a single date, enter the same date in both fields.

30. Part V, #4

(cont.): *Description*

Click in the **Description** field and provide a brief summary of the training that was completed. Proceed to Step 32.

27. Part V, #4

(cont.): *Name of guardian*

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

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

Date	Certification Type	Provider	Description
		AOPC	Participated in online training

29. Part V, #4

(cont.): *Provider*

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

How to Complete a Guardian of the Person Report



31. Part V, #4 (cont.): *Certification type*

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

Add Date	Certification Type	Provider	Description	Delete
22	National Certified Guardian (NCG) / Center for Gu:			

32. Part V, #4 (cont.): *Add other trainings/ certifications*

Repeat Steps 25-31, as needed, to add any other trainings or certifications.

33. Part V, #5: *Criminal activity?*

Click on the dropdown and select 'Yes' or 'No' to specify if the guardian has been charged or convicted of a crime during the reporting period.

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

If you selected 'Yes', continue to Step 34.

Guardian Name	Criminal Charge Description	Delete
Cameron Boggs	On 3/31/2022, Cameron was charged with driving	

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

35. Part V, #5 (cont.): *Name of guardian*

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

37. Part V, #5 (cont.): *Add other charges*

Repeat Steps 34-36, as needed, for any co-guardians that were charged or convicted of a crime during the reporting period.

36. Part V, #5 (cont.): *Description*

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

How to Complete a Guardian of the Person Report



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

Click on the dropdown and select 'Yes' or 'No' to specify if an order for Protection from Abuse (PFA) or Protection from Sexual Violence or Intimidation (PFSVI) was entered against a guardian.

If you selected 'No', proceed to Step 43.

If you selected 'Yes', continue to Step 39.

40. Part V, #6 (cont.): Name of guardian

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

42. Part V, #6 (cont.): Add other orders

Repeat Steps 39-41, as needed, to add this information for any co-guardians that have had a PFA or PFSVI order entered against them.

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

* Guardian PFA/PFSVI Ordered: Yes

Guardian Name	PFA/PFSVI Description	
Cameron Boggs	The order was entered on 3/3/2022 based on pe	

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

41. Part V, #6 (cont.): Description

Click in the **PFA/PFSVI Description** field and summarize the nature of the order that was entered against the guardian.

How to Complete a Guardian of the Person Report



43. Part V, #7: Guardian Service

Click on the dropdown and select 'Yes' or 'No' to specify if any guardian can no longer serve as a guardian.

If 'No', proceed to Step 57.

If 'Yes', continue to Step 44.

45. Part V, #7 (cont.): Name of guardian

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

47. Part V, #7 (cont.): Add other reasons

Repeat Steps 44-46, as needed, to add this information for any co-guardians that can no longer serve as a guardian.

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

* Guardian Cannot Continue: Yes

Guardian Name	Description	
Cameron Boggs	Continued service is no longer in best interest o	

44. Part V, #7: Click the Add Guardian Cannot Continue icon

46. Part V, #7 (cont.): Description

Click in the **Description** field and briefly summarize why the guardian can no longer serve.

How to Complete a Guardian of the Person Report



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.

If 'Yes', continue to Step 49.

If 'No', proceed to Step 57.

50. Part V, #8:

(cont.): 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.

52. 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 fee.

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.

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
500	Joseph K Zimmerman	Annual	

49. Part V, #8: Click the Add Compensation icon

51. Part V, #8: *(cont.): Guardian name*

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

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

Repeat Steps 49-52 for any other guardians that received compensation during the reporting period.

How to Complete a Guardian of the Person Report



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.

A screenshot of a web form titled "9. Was the compensation approved by the court?". It contains two fields: "Guardian Compensation Approved:" with a dropdown menu showing "Yes", and "Guardian Compensation Order Date:" with a date input field showing "07/20/2022" and a calendar icon. A black line from the text above points to the dropdown menu, and another black line from the text to the right points to the date field.

55. Part V, #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 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.

How to Complete a Guardian of the Person Report



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.

Do you have the consent of all co-guardians representing the incapacitated person to submit this report to the court. I hereby swear/affirm that the information is true and correct.

* Co-guardian consent: Yes No

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.

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

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

59. Signature and Affirmation

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

Tip 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.

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
11/29/2022	/s/ Cameron Boggs	Cameron Boggs	Unit	341 Lincoln Ave.			Sar	F	16677			Unit		

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

60. (Optional) Signature and Affirmation (cont.): Comments

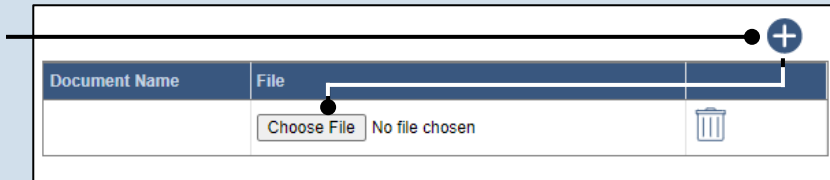
If you have any additional information that you want to provide to the court about the guardianship, enter them in the comments field provided.

How to Complete a Guardian of the Person Report

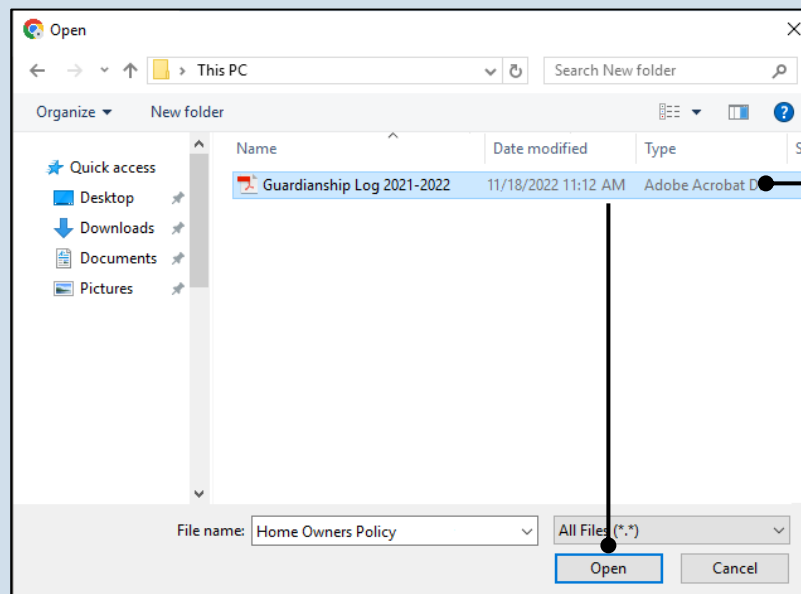


61. (Optional) Signature and Affirmation (cont.): Documents

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.



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.

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.



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-the-public/orphans-court-forms>. 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 that the foregoing information is correct to the best of my knowledge and belief.

I, the guardian of the Person, further acknowledge that the Notice of Filing must be served to the other interested parties on the case.

* Next Action: Save

Save and Close

Ready for Submission

Submit

Ok Cancel View Draft

64. File now or later?

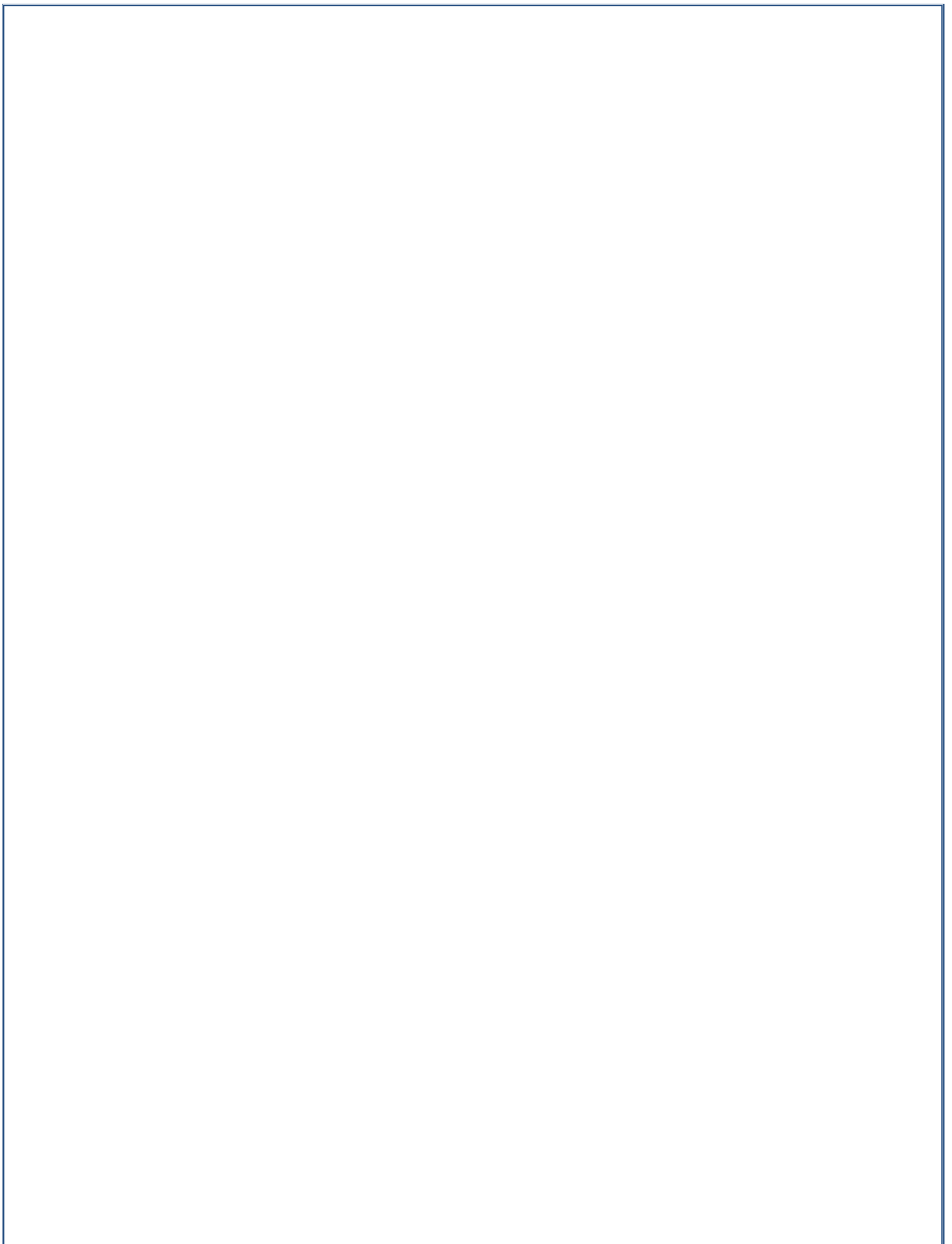
Choose one of the following and click OK:

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.

Active Cases (1)

Easy access for Guardians, Attorneys and interested parties to view active case participant:

Case File No.	County	Caption	Guardian	Adjudication Date	Status	
OC-1001-2021	Butler	Guardianship of Hollings, Kathryn, an Incapacitated Person	Hollings, Gregory	08/09/2021	Adjudicated Incapacitated	

GTS Case - OC-1001-2021 - Guardianship of Hollings, Kathryn

General Information

Judicial Authority	Is Sealed ?	Filing Fees Waived ?	Case Status	Case State	Filing Date	Requester
Yeager, S. Micha	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Adjudicated Incapacitated	Open	08/07/2021	Person (Pl... Estate (Pl...

Incapacitated Person

Case Actions

Guardians

Other Case Participants

Attorneys

Reports

Bond Ordered

Person Info	Age At Petition	Current Age	Date Of Birth	Date Of
	84	86	09/10/1936	mm/dd/yy

Representatives

Appointment Date	Appointed By Court

2. Access the list of reports

On the GTS Case screen, click on the Reports tab.

GTS Case - OC-1001-2021 - Guardianship

General Information

Judicial Authority	Is Sealed ?	Filing Fees Waived ?	Case Status	Has Notes
Yeager, S. Micha	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Adjudicated Incapacitated	

Incapacitated Person

Case Actions

Guardians

Other Case Participants

Attorneys

Reports

Bond Ordered

Report	Due Date	Status	Tags
Inventory	11/09/2021	Accepted	
Person	11/09/2022	Accepted	

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.

How to Amend a Submitted Report



5. Make the necessary changes to the report

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

Added missed hospitalization.

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
 Submit

Ok Cancel View Draft

6. Submit the filing

Choose from one of the following options and click OK:

Option 1: 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*).

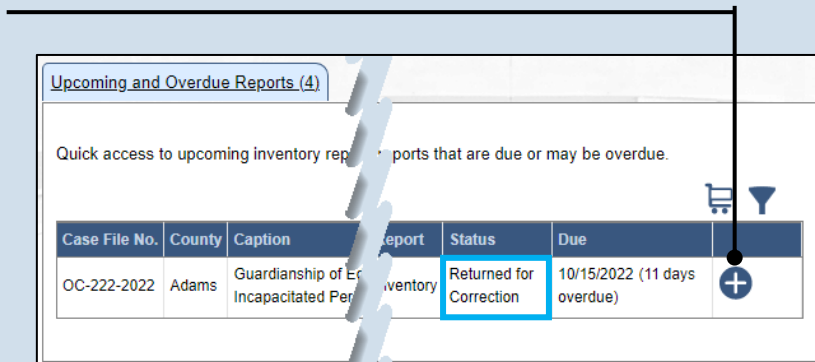


How to Resubmit a Filing that was Returned for Corrections

➤ 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.

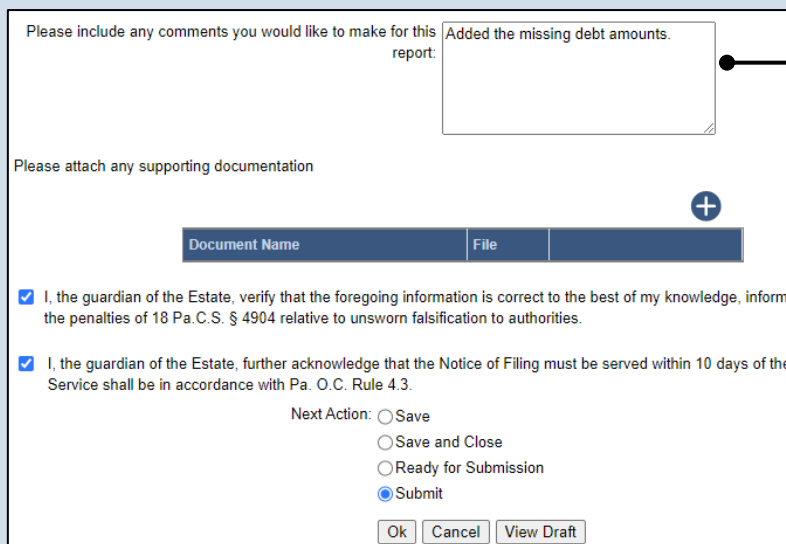


3. Submit the filing

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

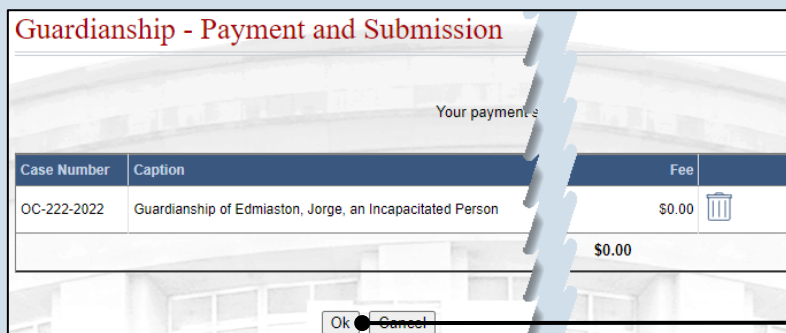
Option 1: To submit this filing, click the **Submit** radio button. This button is only available to those with the authority to submit reports in GTS.

Option 2: 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).



2. Make the necessary corrections

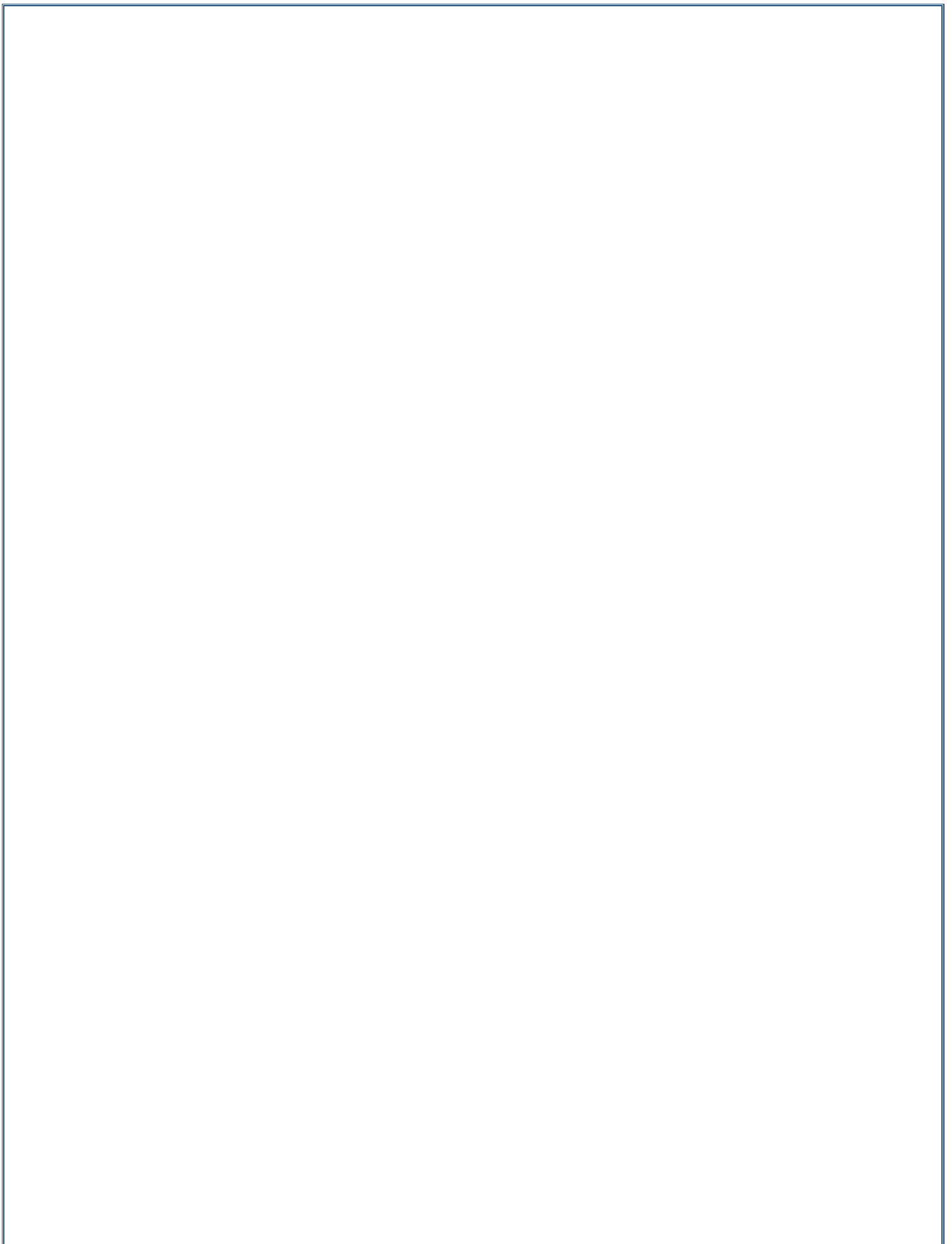
Tip The report does not display the reason it was returned for correction. Refer to the notification you received for this information.



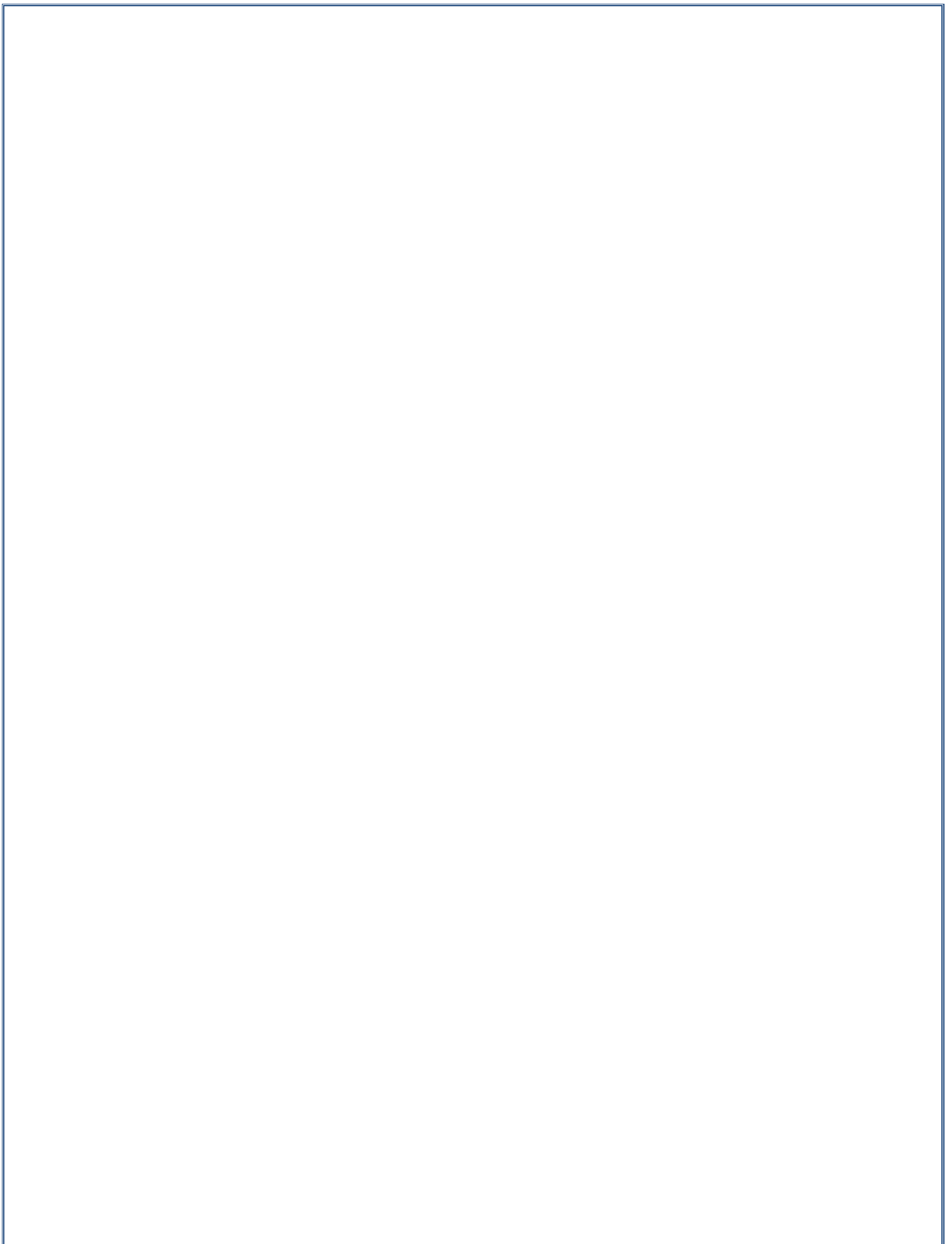
4. Complete the payment screen

Click the OK button.

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



Submission & Payment





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.

Case Number	Caption	Fee
OC-10101-2022	Guardianship of Brian Goodman, an Incapacitated Person	\$15.00
Subtotal:		\$15.00

2. Click OK

3. Enter the cardholder's name

In the PAePay Checkout screen, enter the **First Name** and **Last Name** of the card holder as it appears on the credit card being used for payment.

Reference Number	Description	Current Balance	Amount to Pay
OC-10101-2022	Inventory	\$15.00	\$15.00
	Subtotal		\$15.00
	Service Fee (2.75%)		\$0.41
	Grand Total		\$15.41

Please enter payer name and billing information based on the card being used for pay

* First Name:

* Last Name:

The address information provided should reflect the billing address of the credit or de

* Address Location:

* Address Line 1:

Address Line 2:

* City:

* State:

* Zip Code:

* Phone Number:

* Email Address:

4. Enter the billing address

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

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

5. Enter a phone number

Tip The phone number will only be used if there is a problem with your payment.

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.

7. Click CONTINUE

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



8. Enter your credit card details

Enter the credit card number without any dashes or spaces, the three- or four-digit CVV security code, and expiration date in the appropriate fields.

Tip 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

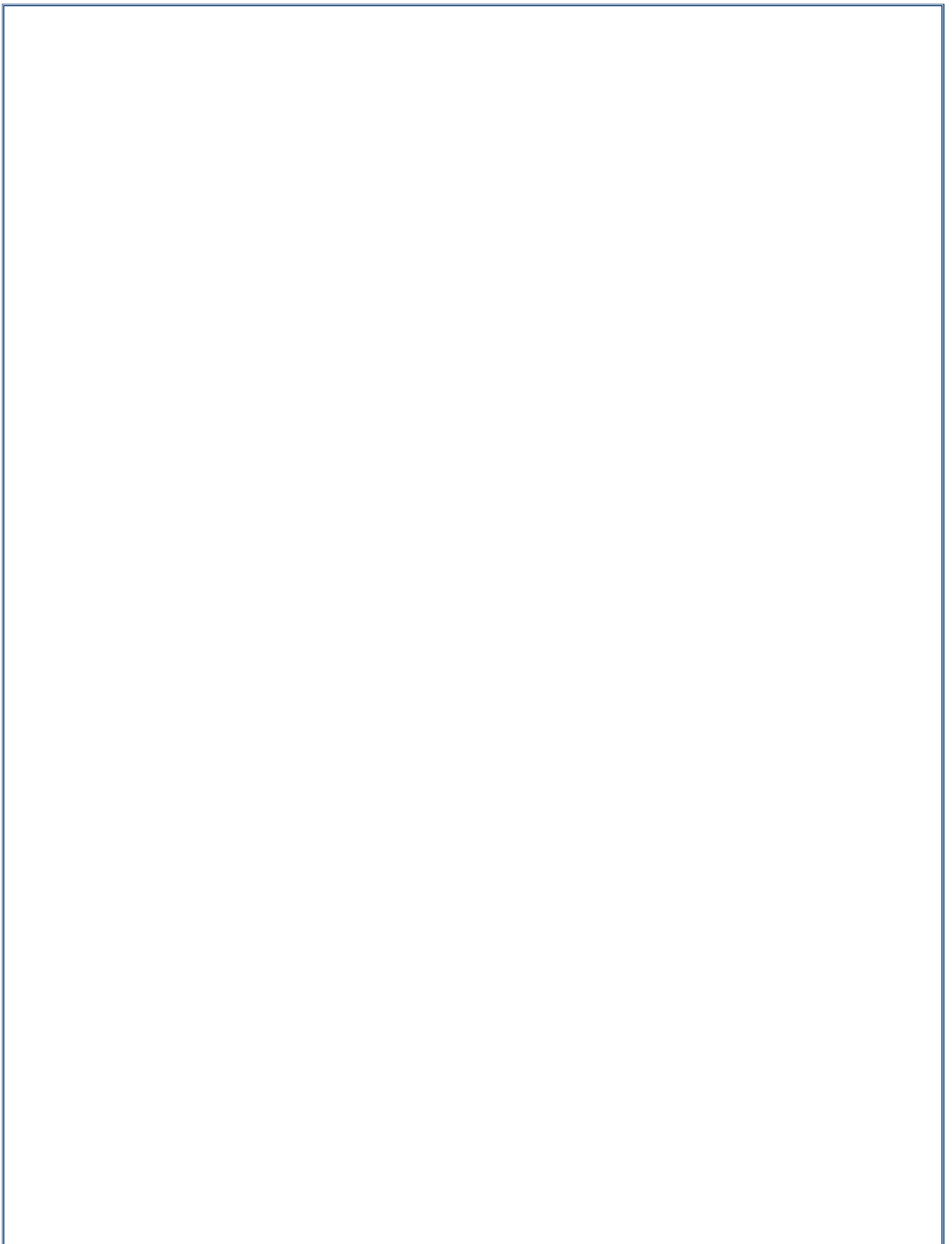
You may click the link to review the details of the agreements.

12. (Optional) Click the **PRINT** button to generate a printable version of the receipt page.

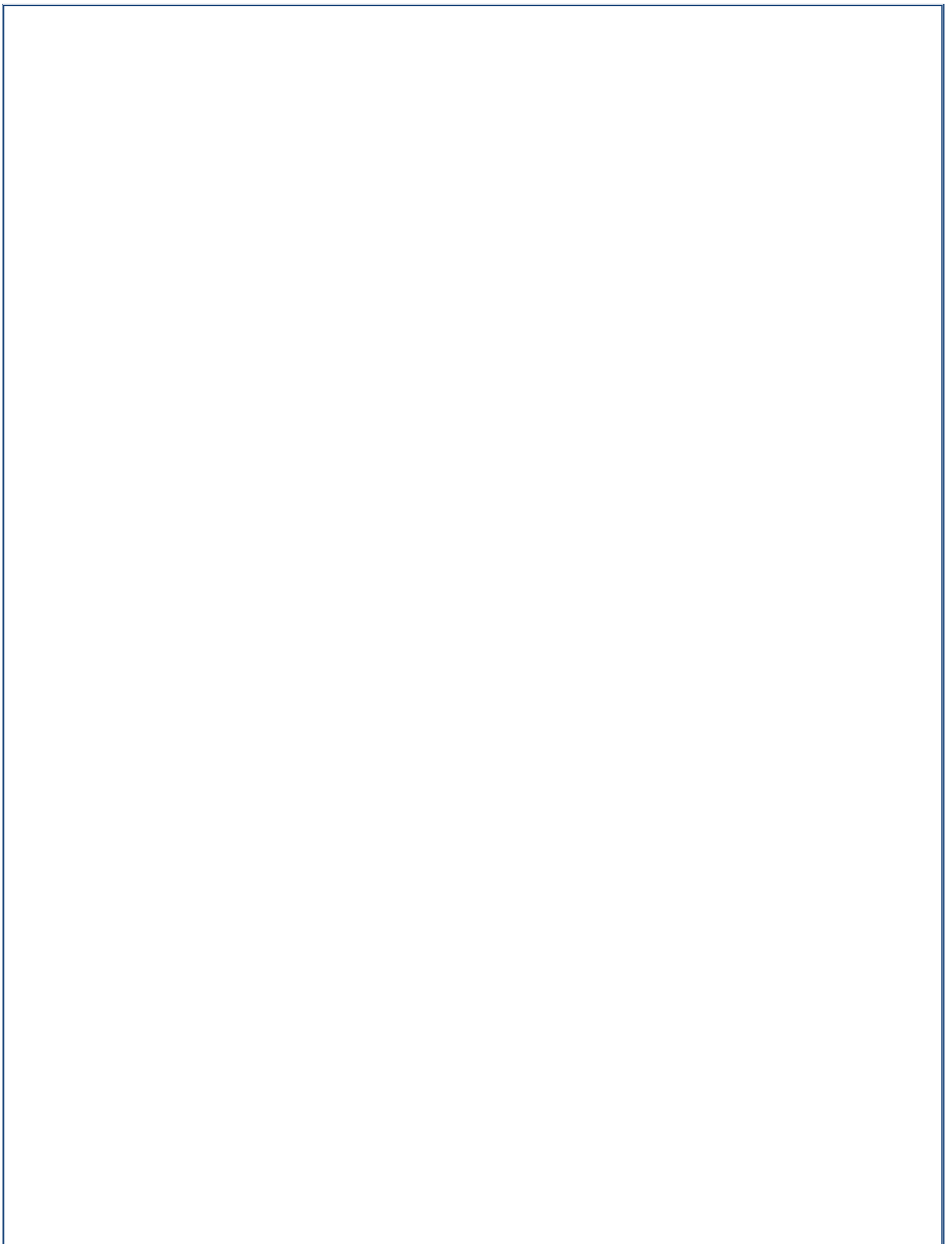
9. Verify the billing address

Tip 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

GTS Dashboard 🔗 Help

The Guardianship Tracking System Dashboard provides users access to cases in which they are an active case participant and the ability to view, edit and submit their inventory and annual reports.

Upcoming and Overdue Reports (29) 1

Quick access to upcoming inventory reports, initial/annual/final reports that are due or may be overdue.

Case File No.	County	Caption	Report	Status	Due	
134-2019	York	Guardianship of Ruel, Lou, an Incapacitated Person	Person	Draft	6/7/2022 (12 days overdue)	
772-2018	York	Guardianship of Kimbell, Lenny, an Incapacitated Person	Inventory	New	6/10/2022 (20 days overdue)	
162-2019	York	Guardianship of Dawg, Lenny, an Incapacitated Person	Person	New	6/10/2022 (26 days overdue)	

Active Cases (17) 2

Easy access for Guardians, Attorneys and interested parties to all cases in which they are an active case participant:

Case File No.	County	Caption	Guardian(s)	Attorney(s)	Filing Date	Adjudication Date	Status	
OC-1201-2019	York	Guardianship of Thorn, Winston, an Incapacitated Person	Windsor Guardians		08/08/2019	08/28/2019	Adjudicated Incapacitated	3
OC-43-2019	York	Guardianship of Harris, Yolanda, an Incapacitated Person	Windsor Guardians		08/02/2019	08/09/2019	Adjudicated Incapacitated	

More Actions

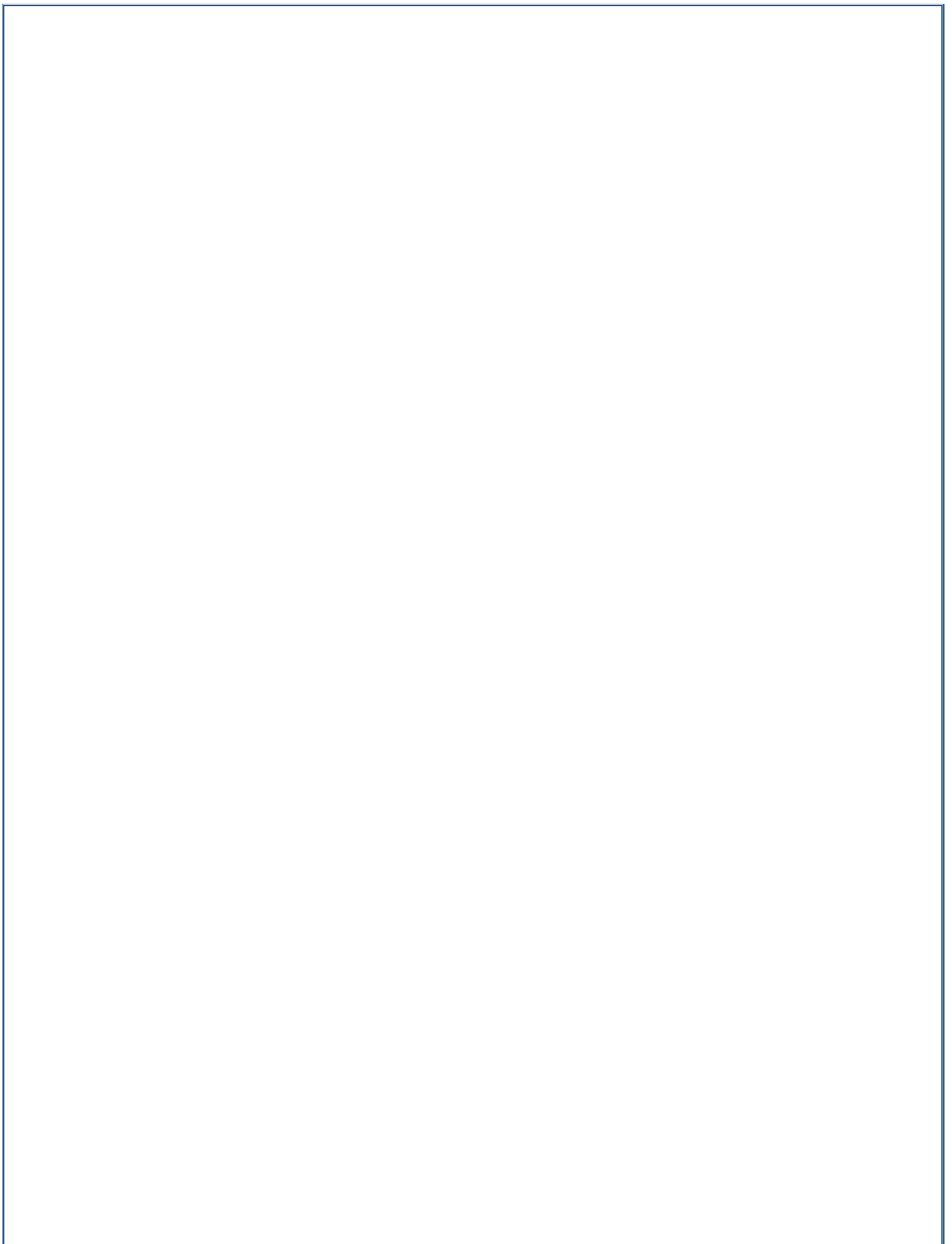
[Notifications 4](#)
[My GTS Profile 5](#)
 Organization Profile:
 Windsor Guardians 6

Recent News

[Latest GTS News 7](#)
 Updated: 9/13/2022

Need technical assistance?
 Call the GTS Help Desk at: 1-877-227-2672 or send an e-mail to:
GTSOAOPC@pacourts.us
 The Help Desk is available Monday-Friday from 8:00am-4:30pm EST. Please note that the Help Desk is unable to provide legal assistance or take

- | | |
|---|--|
| <ol style="list-style-type: none"> 1. Upcoming and Overdue Reports – Displays all reports for an incapacitated person that are overdue and the next reports that are due. Access reports using the Create Report and Edit Report icons and submit multiple reports ready for submission. The reports displayed can be filtered by numerous options by use of the Filter icon. 2. Active Cases – Lists and provides access to all active cases for the guardian or guardian organization. The cases displayed can be filtered by numerous options by use of the Filter icon. 3. Favorites – Any case marked as a favorite will always display at the top of the Active Cases grid. If any are marked as favorites, you will only receive notifications on those cases. | <ol style="list-style-type: none"> 4. Notifications – View all notifications regarding the status of filings submitted by guardians and upcoming and overdue reports. 5. My GTS Profile – View/update some of your UJS Web Portal account profile information and provides the ability to record assigned counties, trainings, and certifications. 6. Organization Profile – View/update some of the UJS Web Portal account profile information for a guardian organization and add counties in which they provide guardian services. 7. Recent News – Opens the ‘GTS News’ section of the Help and displays any information that has been published which affects your use of the GTS. The date that appears indicates the last time information was published. |
|---|--|





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.

Active Cases (1)

Easy access for Guardians, Attorneys and interested parties to participant:

Case File No.	County	Caption	Guardian(s)	Date	Status	
OC-325-2020	Butler	Guardianship of Sobeck, Elizabeth, an Incapacitated Person	Sobeck-Moore, Patricia Mavero, Elizabeth Tuccillo	2020	Adjudicated Incapacitated	★ 🔍

2. Click on the tab needed

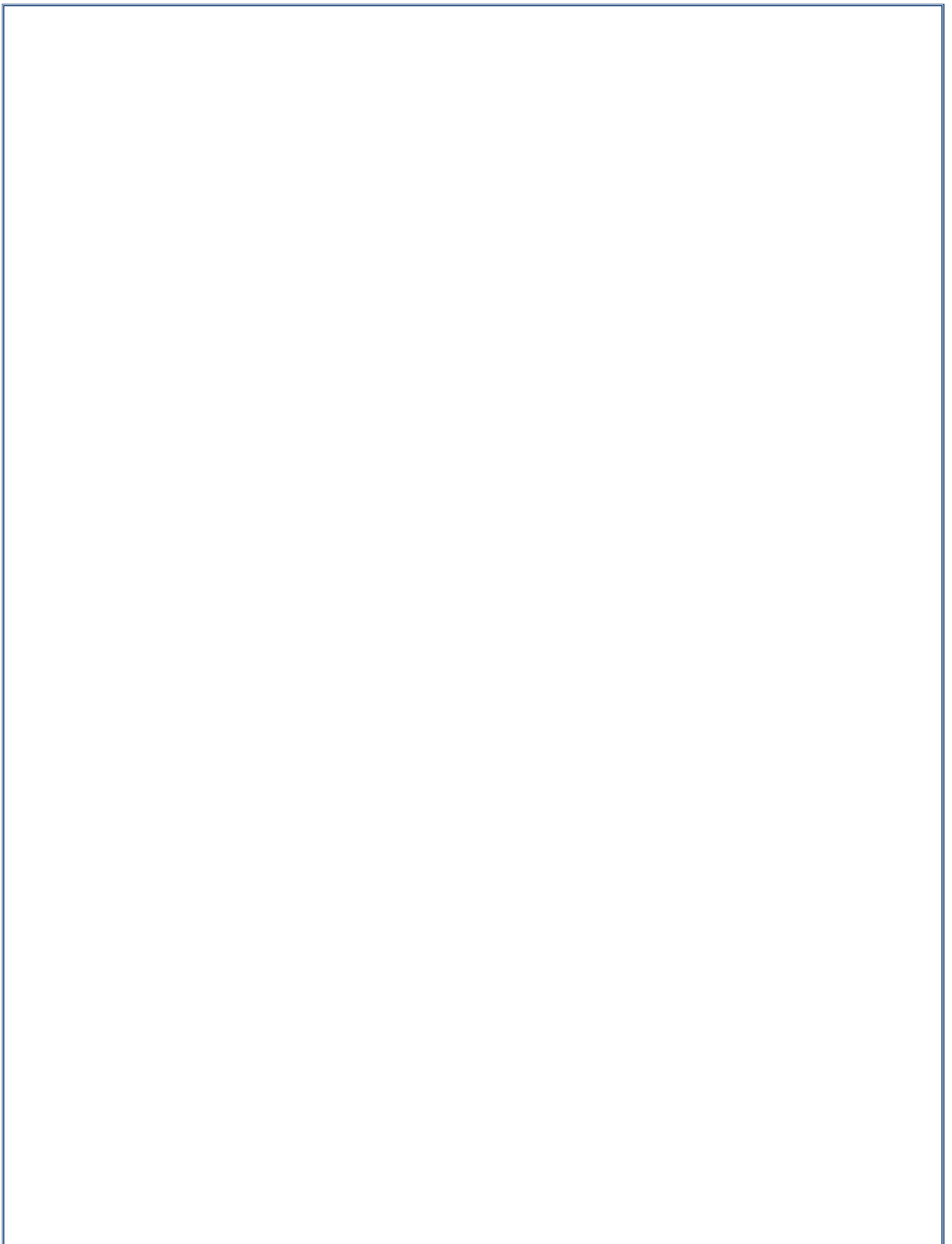
On the GTS Case screen, the information is organized into tabs on the left-hand side. Click a tab to access the available details.

Incapacitated Person	Person Info		
Case Actions	Age At Petition	Current Age	Date Of Birth
Guardians	89	92	09/14/1930
Other Case Participants	Representatives		
Attorneys	Appointment Date		
Reports			
Bond Ordered			

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** – Displays basic details about the person that is the subject of the case.
- **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.

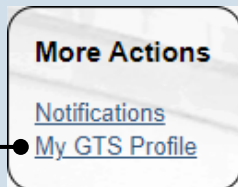




How to Add Trainings and Certifications

1. Access your GTS profile

In the More Actions area of your Dashboard, click the *My GTS Profile* link.

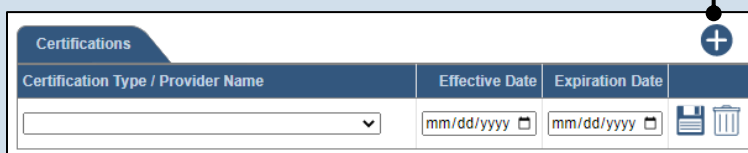


2. Are you adding a certification?

To add a certification, continue to Step 3. Otherwise, proceed to Step 6.

3. Insert a new certification row

Click the Add Certification icon above the Certifications grid.

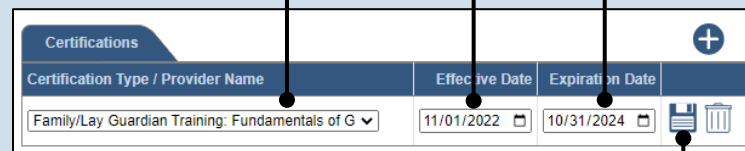


4. Record the certification details

Select the **Certification Type/Provider Name** from the dropdown and enter the **Effective Date** and **Expiration Date** of that certification.

5. Click the Save icon

The certification is saved to your profile.

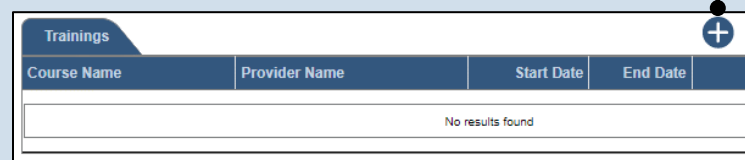


6. Are you adding training?

To add trainings for a guardian, continue to Step 7. Otherwise, this process is complete.

7. Insert a new training row



Click the Add Training icon above the Trainings grid.



How to Add Trainings and Certifications



8. 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	 

9. Enter the provider

Enter the name of the individual, organization, or institution that offered the training in the **Provider Name** field.

10. Enter the training dates
Enter the **Start Date** of the training. Entering the **End Date** is optional.

11. Click the Save icon

The training is saved to the guardian's person record.

12. Enter additional training

Repeat Steps 7 – 11 for additional trainings.



How to Assign Organizational Proxy Rights

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.

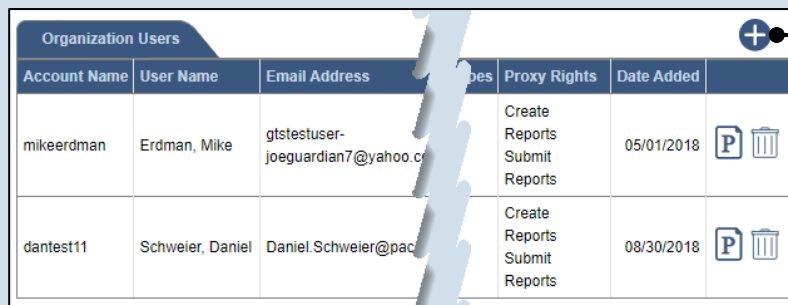


2. (Optional) Search for the organization

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

5. Select a Search Type

In the Add Organization User popup, click on the **Search Type** dropdown and select 'Name or 'PA Bar ID'.

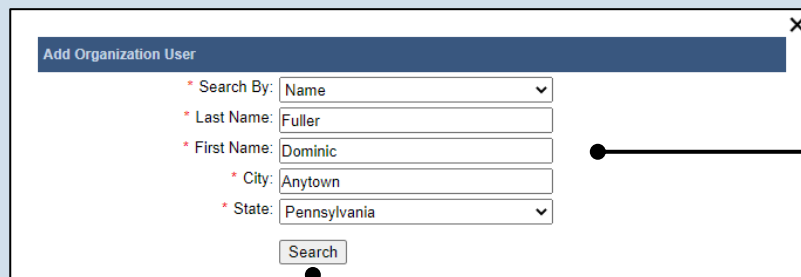


4. Access the Add Organization User screen

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

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

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



6. Enter your search criteria

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

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

7. Click SEARCH

How to Assign Organizational Proxy Rights



8. Confirm the individual

When your search results are displayed, locate the appropriate individual and select the checkbox next to their name.

Account Name	User Name	Email Address	Location	PA Bar Number
<input checked="" type="checkbox"/>	dfuller	Fuller, Dominic	dfuller@guerrillamail.com	Anytown, PA

9. Click SUBMIT

10. Click the Edit User Proxy Rights icon

In the Organization Users grid, click this icon for the individual you just added.

Account Name	User Name	Email Address	Types	Proxy Rights	Date Added	
mikeerdman	Erdman, Mike	gtstestuser-joeguardian7@yahoo.com		Create Reports Submit Reports	05/01/2018	
dfuller	Fuller, Dominic	dfuller@guerrillamail.com		None	11/16/2022	

11. Assign proxy permissions

In the Manage User Proxy Rights popup, locate the individual and select the appropriate permissions for that proxy.

Proxy Right Category	Proxy Right Name
<input type="checkbox"/> Organization Management	Access Management User
<input checked="" type="checkbox"/> Guardianship Management	Create Reports
<input checked="" type="checkbox"/> Guardianship Management	Submit Reports

12. Click SUBMIT

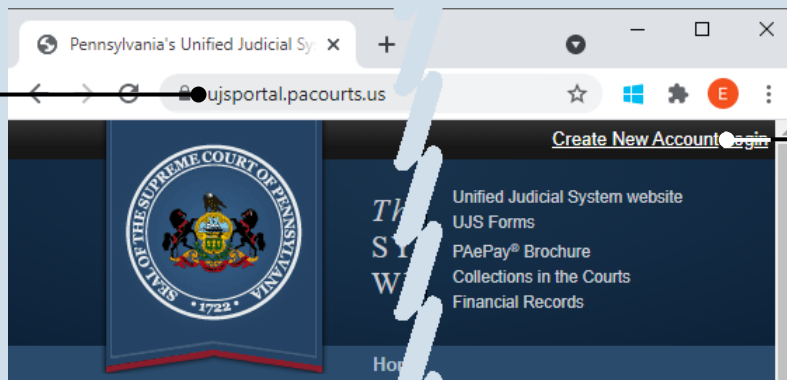
- **Access Management User** – Provides the authority to administer the privileges of all proxies in the organization. This privilege designates an individual as an AMU.
- **Create Reports** – Provides the authority to complete new reports on behalf of the organization. This does not grant the right 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.



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.

Tip 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.

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

Tip 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 e-mail address.

Register New Account

* Requesting User Name:

* First Name:

Middle Name:

* Last Name:

Name Suffix:

* Address Location:

* Address Line 1:

Address Line 2:

* City:

* State:

* Zip Code:

* Phone Number:

Phone Number Ext.:

* Email Address:

* Confirm Email Address:

Alternate Email Address:

4. Enter your personal information

You must complete all fields that feature an asterisk or star (*).

Tip Any address you enter here will appear as your default billing address if you are required to complete the GTS payment process. You will be able to update this default information, however, at the time of payment.

5. Click SUBMIT

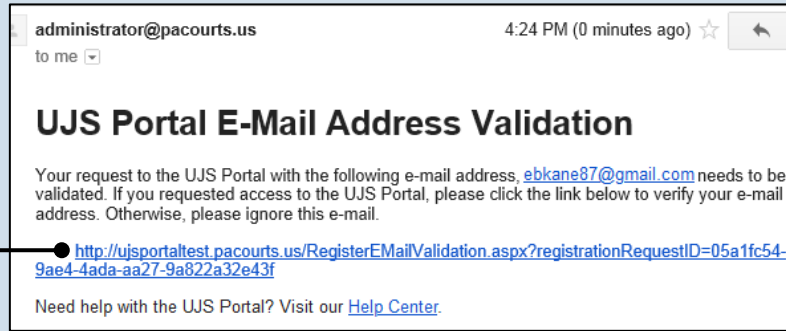
How to Create Your UJS Web Portal Account



6. Confirm your e-mail 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.



7. Create your password

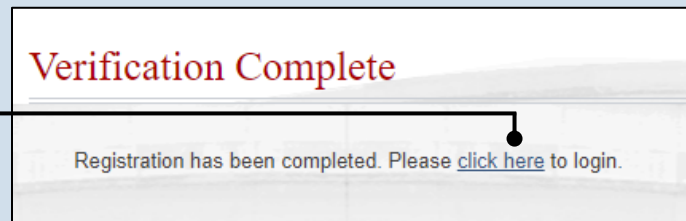
On the Complete your Registration screen, enter a password and then confirm it by entering it again.

Click the SUBMIT button.

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

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.

9. Login with your new account

In the Account Login screen, enter the username and password you just created and click the LOGIN button.

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'.

Role Name	Reference Num	Date Added
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How to Create Your UJS Web Portal Account



11. Enter your guardian or interested party role

In the Request Role screen, click on the **Role** dropdown and select 'Guardianship Case Participant.'

Tip If you have not received your user access code letter from the court, your role cannot be added until it is obtained.

Request Role

* Role: Guardianship Case Participant

* User Access Code: cc7D48T

Submit

12. Enter your access code

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

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 your cases until the error is corrected.

13. Click SUBMIT

Steps 14-17 are optional and only apply to individuals working for guardianship organizations.

If this does not apply to you, **congratulations**, you've completed this process.

Organization Name	Has	Date Added

14. (Optional) Add your professional organization

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

15. Search for your organization

In the Request Organization popup screen, use the **Name**, **State**, and **City** fields to identify the organization you work for.

Request Organization

* Name: guardian care

* State: Pennsylvania

* City: Mechanicsburg

Search

Organization Name	Organization City
<input checked="" type="checkbox"/> Guardian Care	Mechanicsburg

Submit

16. Click SEARCH

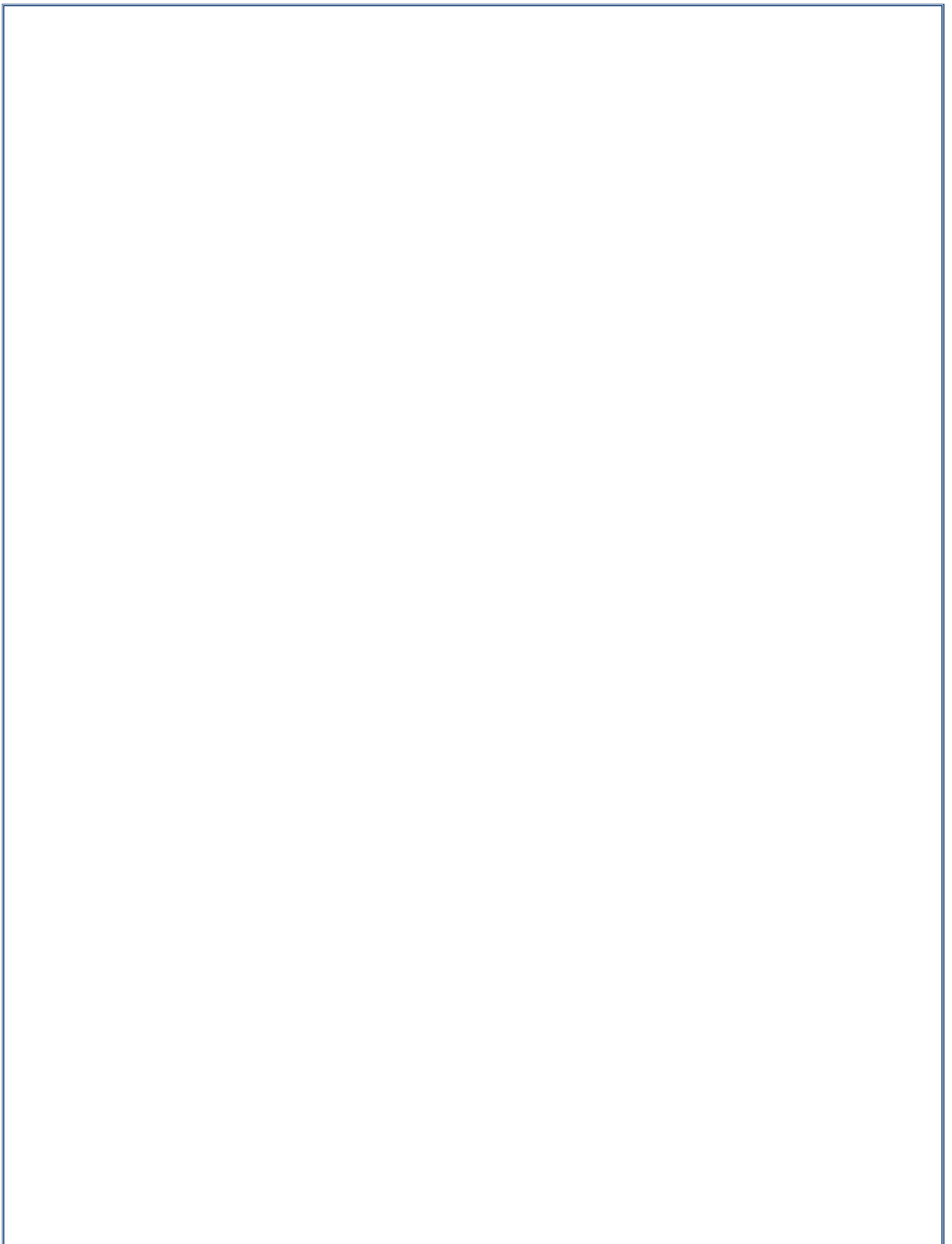
Tip If the organization is not found, repeat Step 15 using different information for the search.

17. Select the organization

Select the checkbox appearing to the left of your organization.

18. Click SUBMIT

Congratulations! You've completed this process.

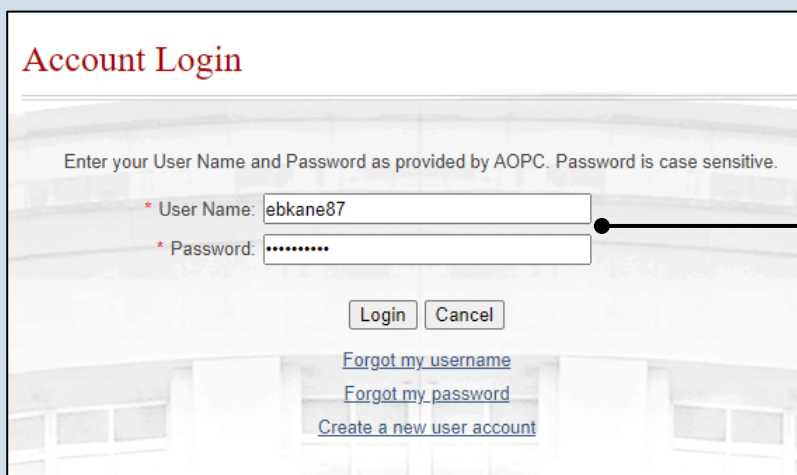
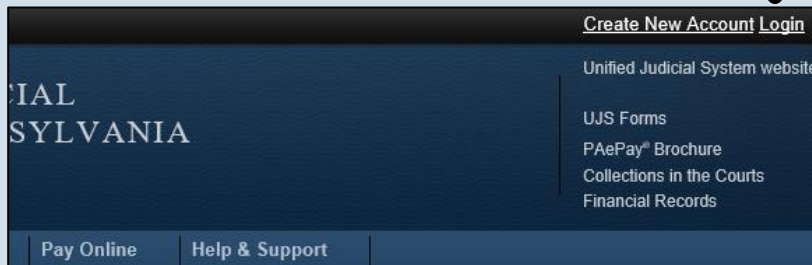




How to Apply an Access Code to Your UJS Web Portal Account

1. Click the Login link

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



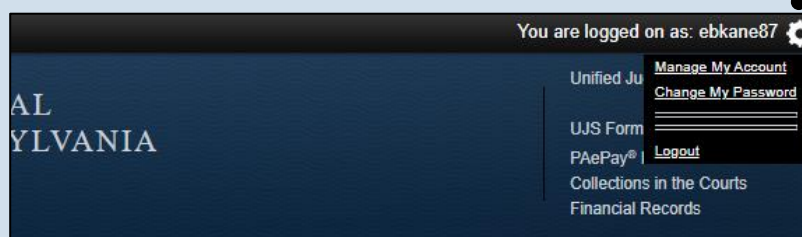
2. Enter your login credentials

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

Tip For security 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.'



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.

Manage Account

* User Name: ebkane87
* First Name: Elizabeth
Middle Name:
* Last Name: Kane
Name Suffix:
* Address Location: United States
* Address Line 1: 105 W. Main St.
Address Line 2:
* City: Mechanicsburg
* State: Pennsylvania
* Zip Code: 17055
* Phone Number: (717) 555-1534
Phone Number Extension:
* Email Address: ebkane87@gmail.com
* Confirm Address: ebkane87@gmail.com
Alternate Email Address: ebkane87@gmail.com
Password is Expired:
Submit

Roles

Role Name	Reference Number	Status	Date Added
No results found			

5. Enter your guardianship role

In the Request Role popup, click on the **Role** dropdown and select 'Guardianship Case Participant'.

6. Enter your access code

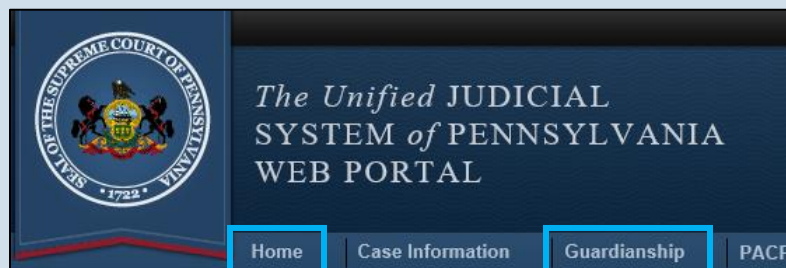
Enter the new access code provided in the letter from the Orphans' Court.

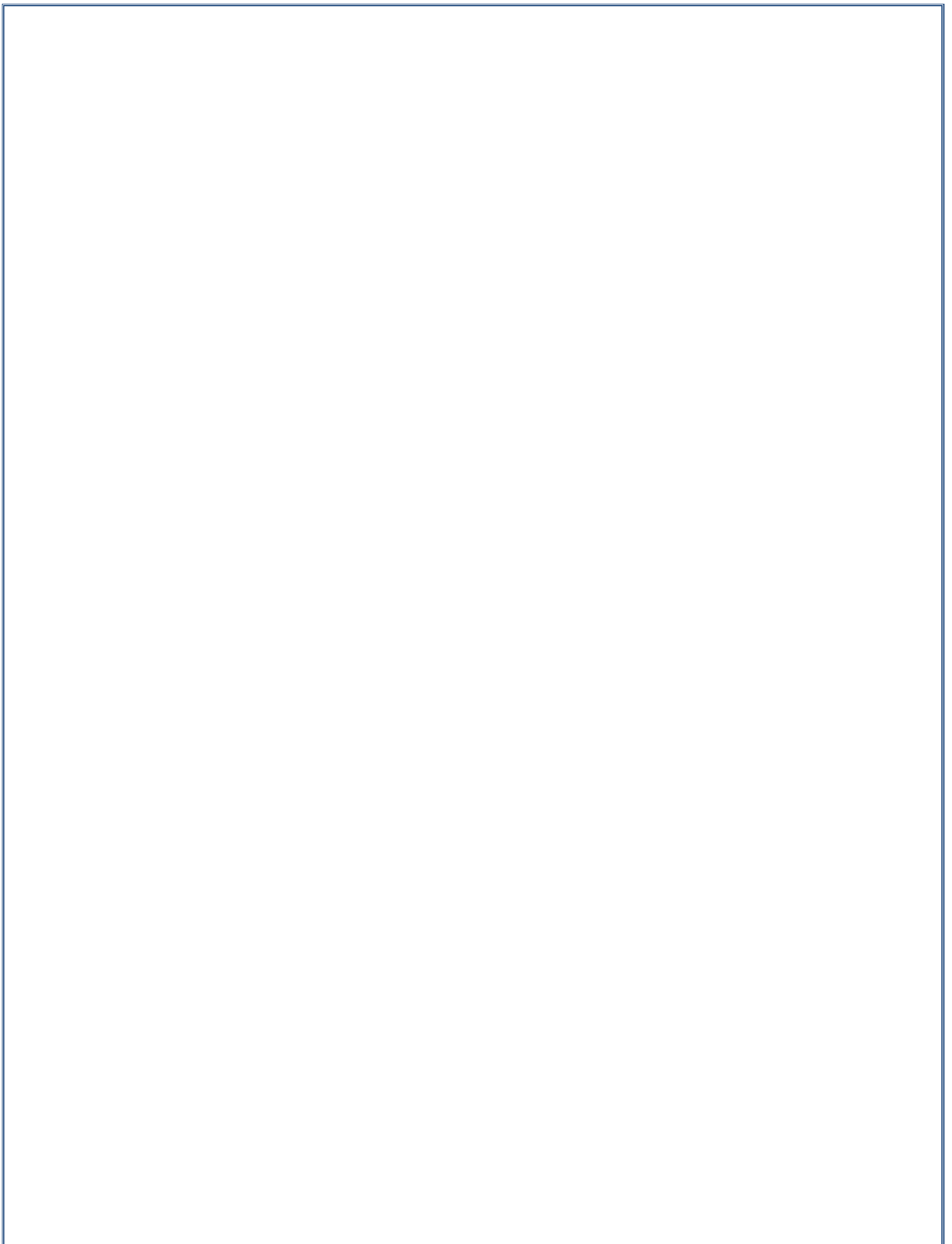
Request Role

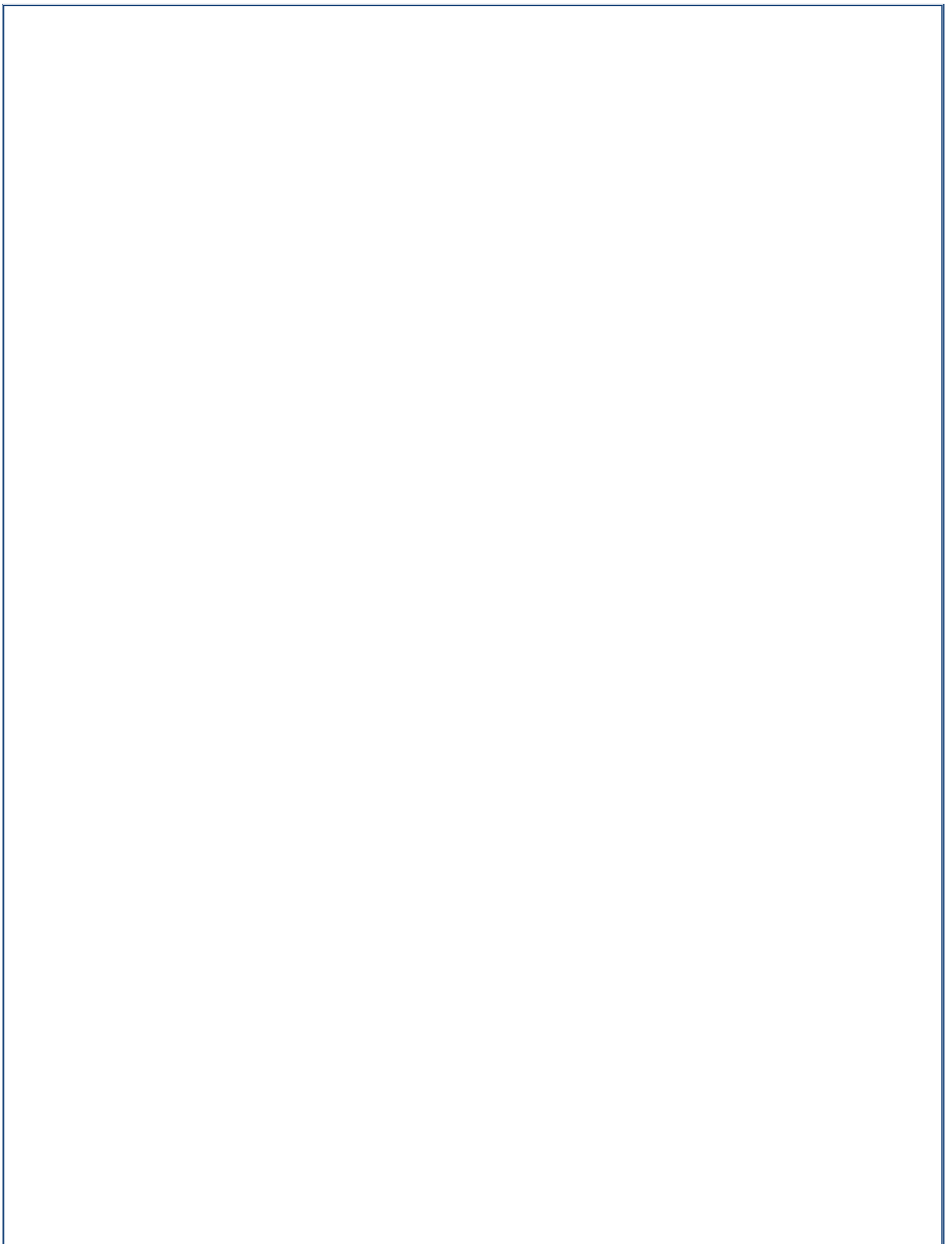
* Role: Guardianship Case Participant
* User Access Code: 67534312
Submit

7. Click SUBMIT

Tip: 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.







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