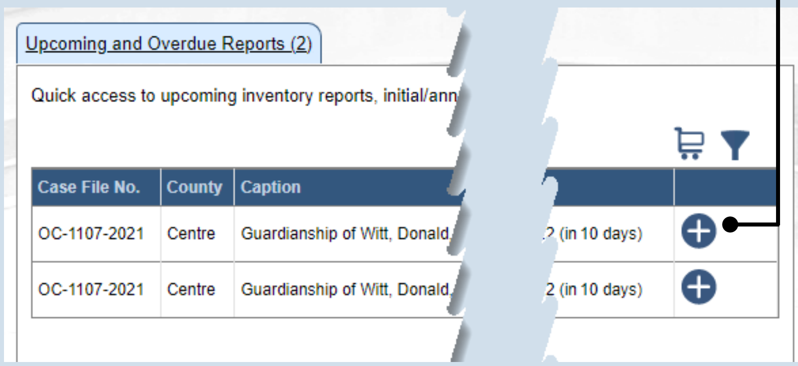
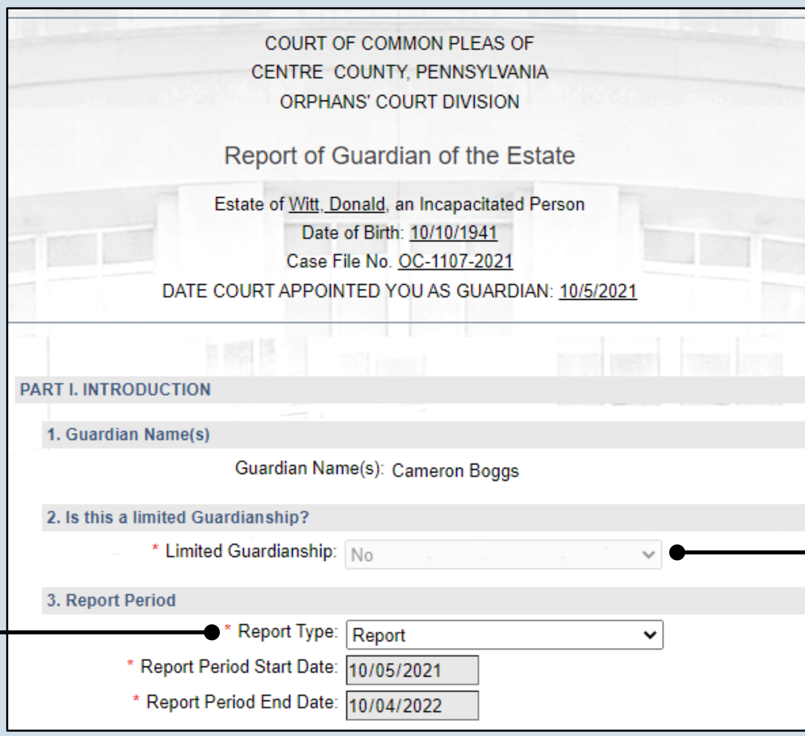
How to Complete a Guardian of the Estate Report

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).





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.

3. Part I, #3: Report Type

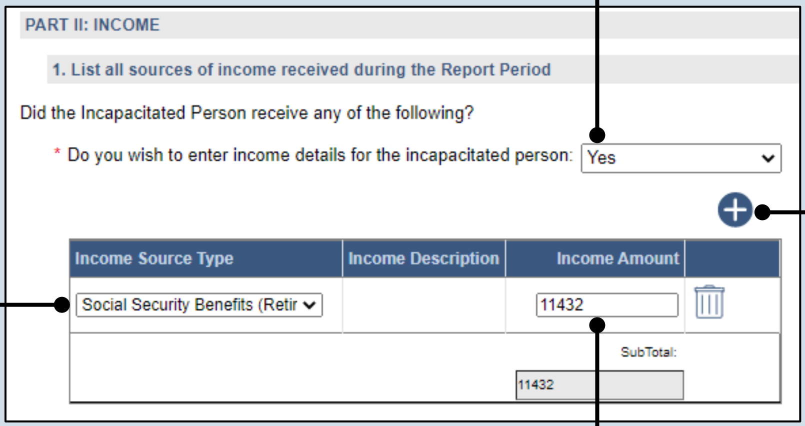
Click on the **Report Type** dropdown and select the appropriate option.

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

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.



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

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.

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

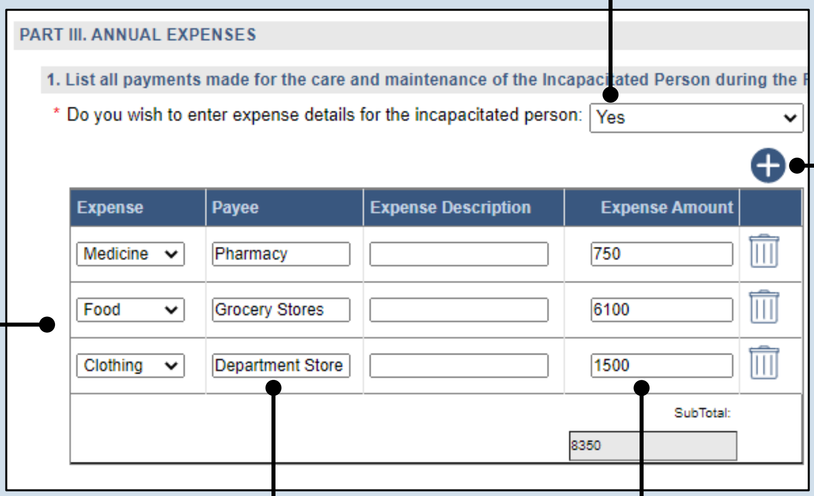
Click in the **Income Amount** field and enter the annual income, in U.S. dollars, for the selected income source type.

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

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

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.


PART III. ANNUAL EXPENSES

1. List all payments made for the care and maintenance of the Incapacitated Person during the F

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

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

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.

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

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.

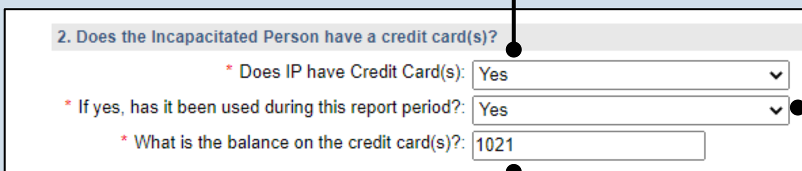
14. Part III, #1 (cont.): ***Add other expenses***
Repeat Steps 10-13 for any additional expenses paid for from the IP's income or estate.

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*

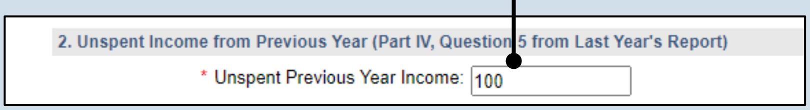
Click in the field and enter the current balance on the credit card(s).

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.



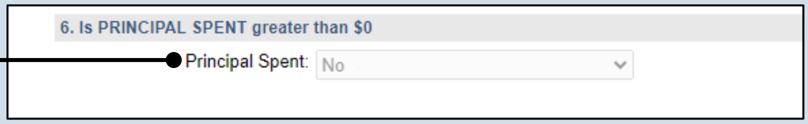
2. Unspent Income from Previous Year (Part IV, Question 5 from Last Year's Report)

* Unspent Previous Year Income: 100

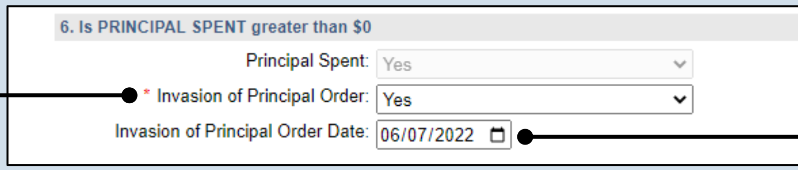
How to Complete a Guardian of the Estate Report

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.

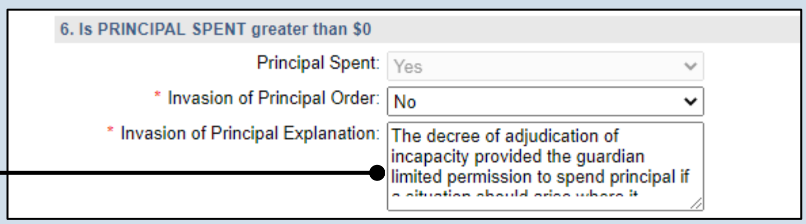


If the Principal Spent (Question #5) is greater than $0, then the first field in Question #6 will default to ‘Yes’. Click on the second dropdown and select ‘Yes’ or ‘No’ to specify if a court order was obtained to spend part of the principal. If ‘Yes’, continue to Step 20. If ‘No’, proceed to Step 21.



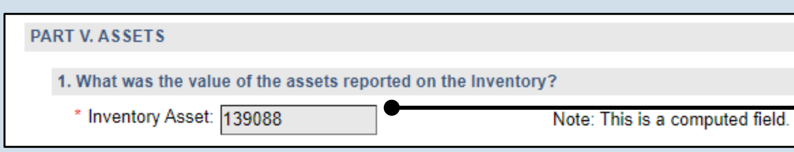
20. Part IV, #6 (cont.):
Court order date

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.



22. Part V, #1:
Inventory Assets

If the total value of the IP’s assets is available electronically from the Inventory report, this field defaults automatically. If this amount displays, continue to Step 23.

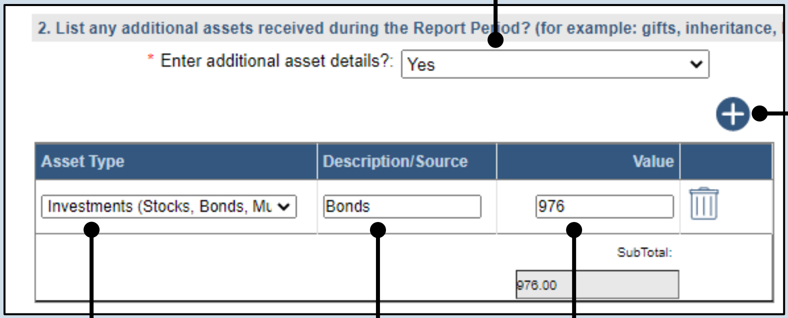
If the total value of the IP’s assets is not available electronically, click in the field and enter this amount. This can be found on the paper version of the Inventory report or you can contact the court where this case is filed for this information. Continue to Step 23.

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.



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.

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

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

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

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

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

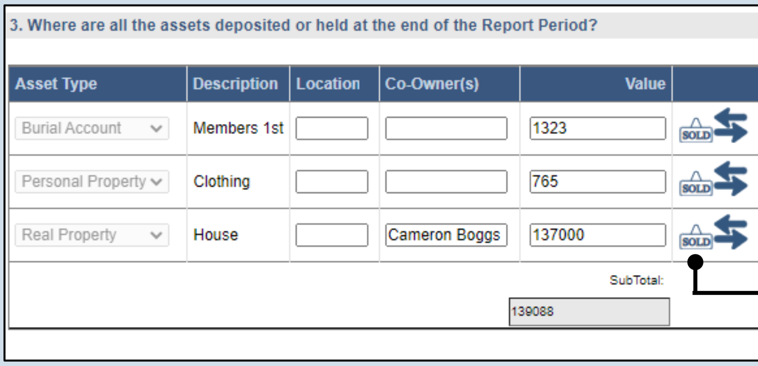
Repeat Steps 24-27 for all the IP's assets.

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.

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



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.

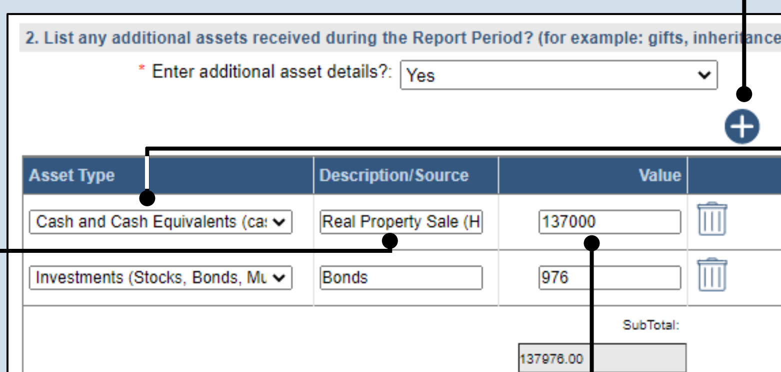
31. Part V, #3 (cont.): *Asset Type*

Go back to Question Part V, #2 and click the Add Asset icon.

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.

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

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

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

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

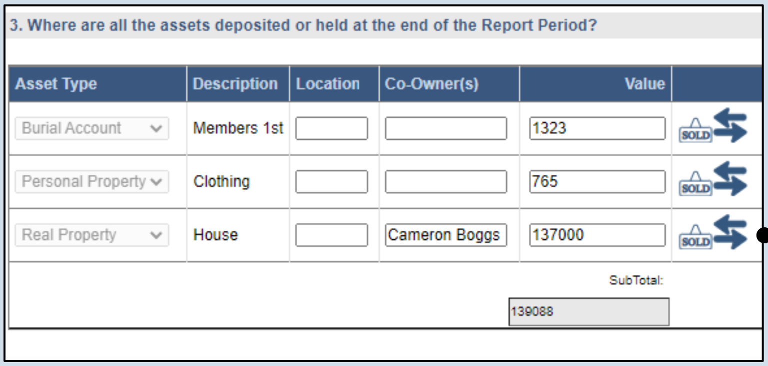
How to Complete a Guardian of the Estate Report

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?

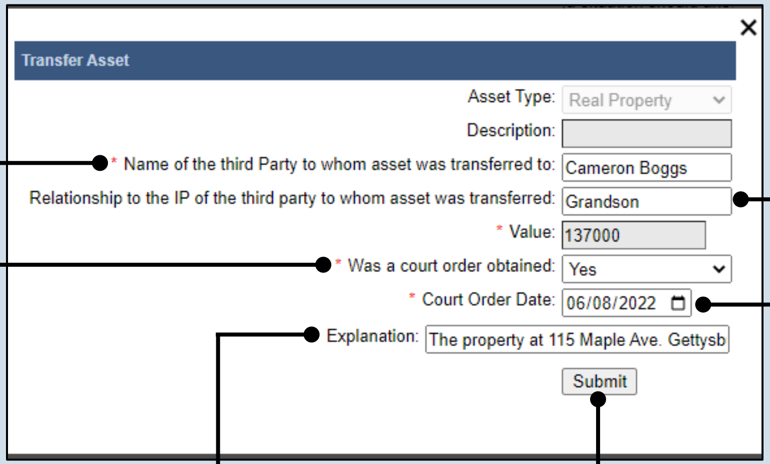
Asset Type	Description	Location	Co-Owner(s)	Value	
Burial Account	Members 1st			1323	SOLD
Personal Property	Clothing			765	SOLD
Real Property	House		Cameron Boggs	137000	SOLD
				SubTotal: 139088	

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.



Transfer Asset

Asset Type: Real Property

Description:

* Name of the third Party to whom asset was transfered 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.

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.

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.

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.

43. Part V, #3 (cont.): *Complete transfer*

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

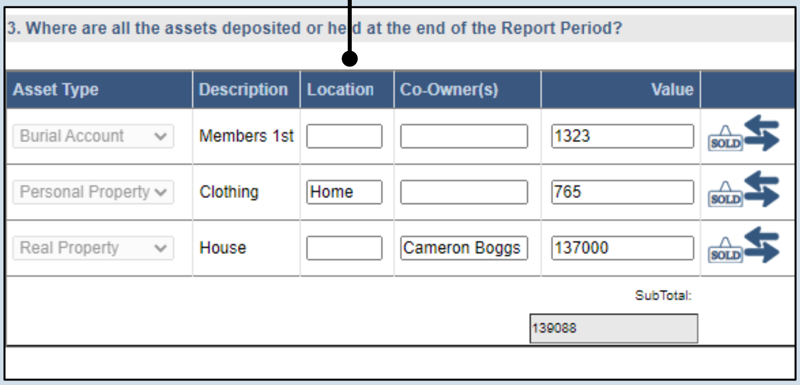
44. Part V, #3 (cont.): Add/edit a location?

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

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

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	SOLD
Personal Property	Clothing	Home		765	SOLD
Real Property	House		Cameron Boggs	137000	SOLD
				SubTotal: 139088	

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

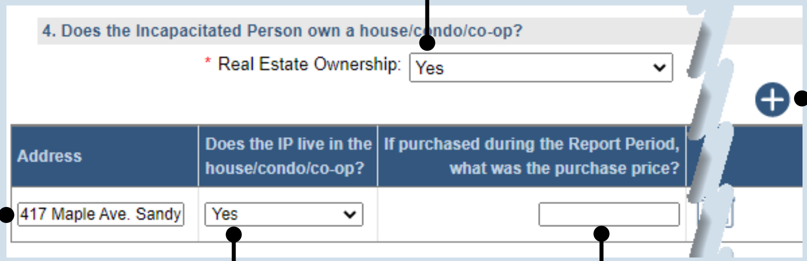
Repeat Steps 45 for any other asset locations that need to be added or updated.

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.



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.

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.

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

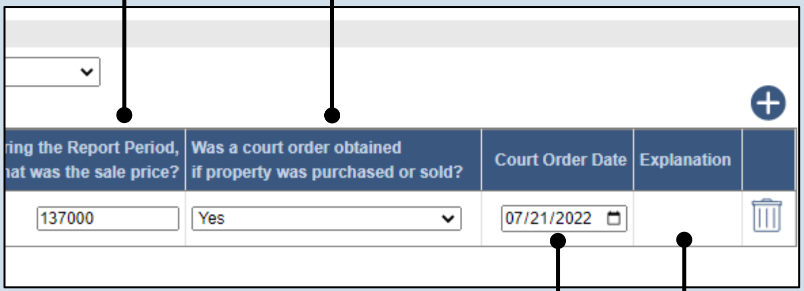
If the house/condo/co-op was purchased during the reporting period, enter the purchase price. If not, leave this field blank.

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.

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.



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.

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

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

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

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

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.

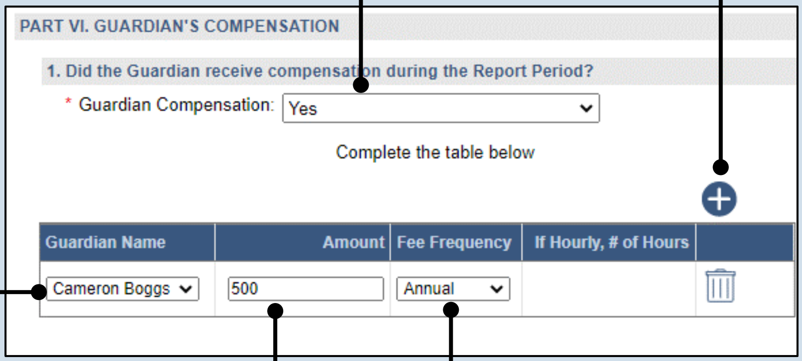
58. Part VI, #1: Click the Add Compensation icon

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.

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 <u>all</u> 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.

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

Repeat Steps 58-61 for any other guardians that received compensation during the reporting period.

63. Part VI, #2: Compensation approved?

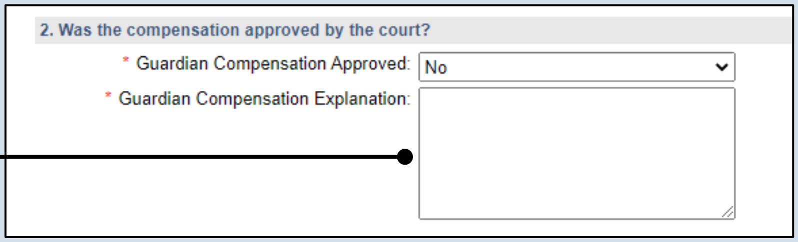
If you answered ‘Yes’ to Question #1 above, click on the dropdown and select ‘Yes’ or ‘No’ to specify if the court authorized the compensation to the guardians.

If you answer ‘Yes’, continue to Step 64.

If you answer ‘No’, proceed to Step 65.

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.

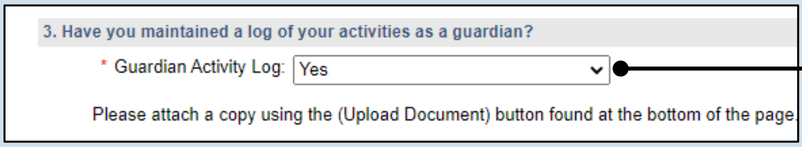


65. Part VI, #2 (cont.): *Explanation*

Click in the **Guardian Compensation Explanation** field and enter a summary that explains why court approval was not obtained to compensate the guardian.

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.



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.

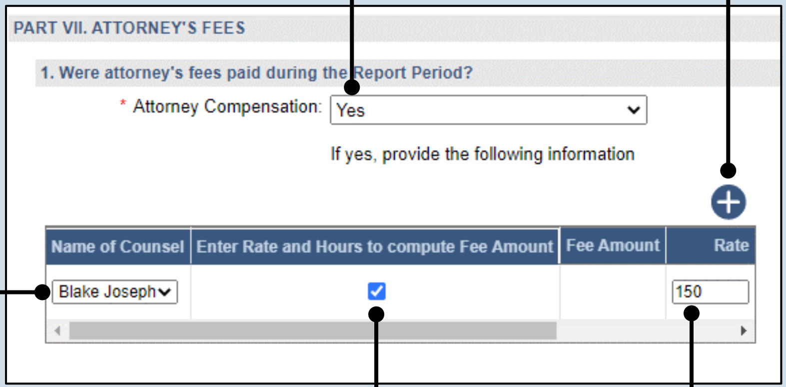
67. Part VII, #1: *Attorney fees*

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.

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


PART VII. ATTORNEY'S FEES

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

* Attorney Compensation: Yes

If yes, provide the following information

Name of Counsel	Enter Rate and Hours to compute Fee Amount	Fee Amount	Rate
Blake Joseph	☑		150

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.

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

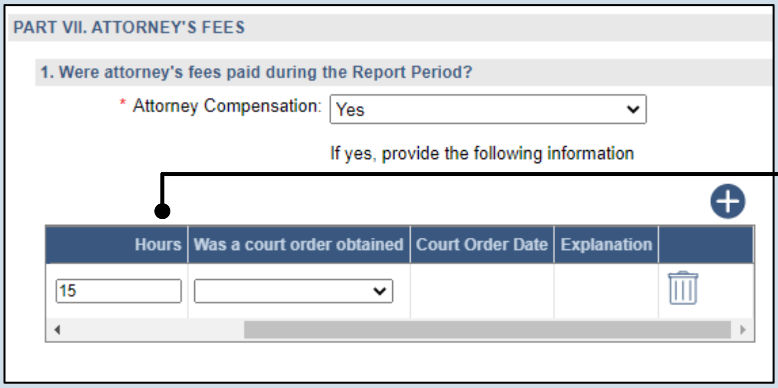
Select this checkbox if you have the number of hours the attorney worked on the case and their hourly rate.

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.

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.


PART VII. ATTORNEY'S FEES

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

* Attorney Compensation: Yes

If yes, provide the following information

Hours	Was a court order obtained	Court Order Date	Explanation	
15				

72. Part VII, #1 (cont.): *Hours*

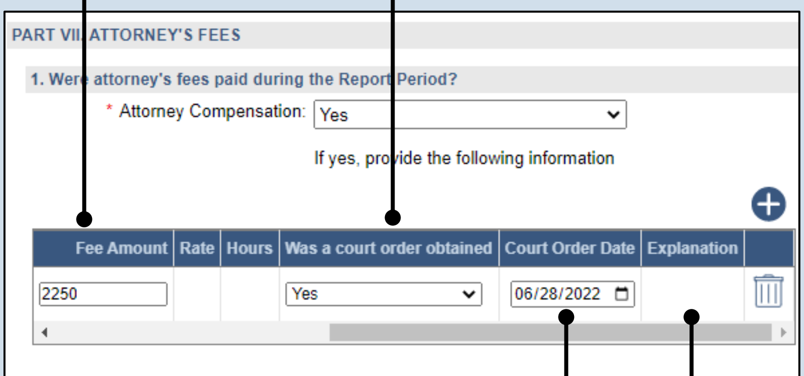
Click in the **Hours** field and enter the number of hours the attorney worked on the case. Proceed to Step 74.

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.

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.



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.

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.

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

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

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.

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

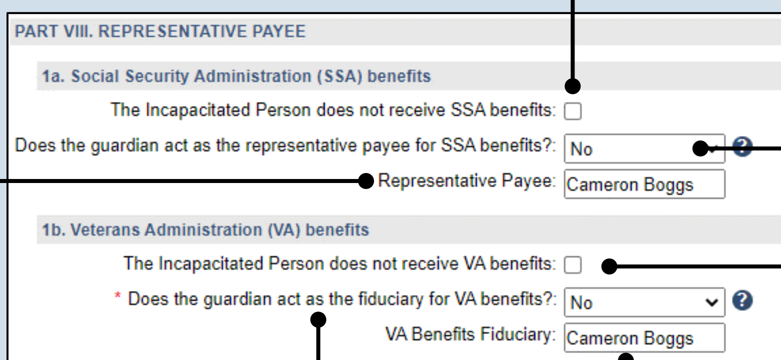
Click on the dropdown and select ‘Yes’ or ‘No’ to specify if the guardian acted as the representative payee of the SSA benefits during the reporting period.

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.

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.



PART VIII. REPRESENTATIVE PAYEE

1a. Social Security Administration (SSA) benefits

The Incapacitated Person does not receive SSA benefits: ☐

Does the guardian act as the representative payee for SSA benefits?: No

Representative Payee: Cameron Boggs

1b. Veterans Administration (VA) benefits

The Incapacitated Person does not receive VA benefits: ☐

* Does the guardian act as the fiduciary for VA benefits?: No

VA Benefits Fiduciary: Cameron Boggs

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.

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.

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

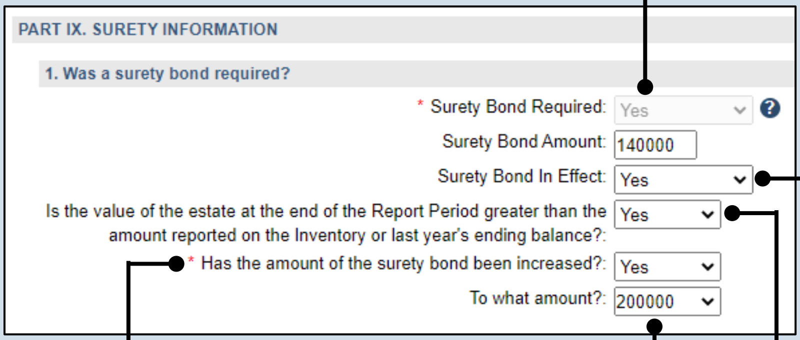
Click in the field and enter the name of the person acting as the fiduciary of the IP’s VA benefits.

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.



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.

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

Click in the field (not pictured) and summarize why the surety bond is no longer in effect.

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.

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.

89. Part IX, #1 (cont.): *Amount*

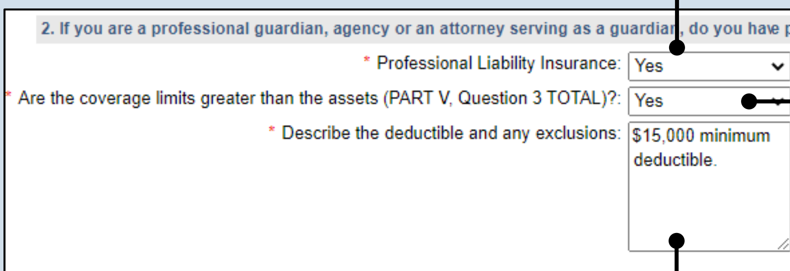
Click in the **To what amount?** field and enter the new amount of the surety bond.

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.



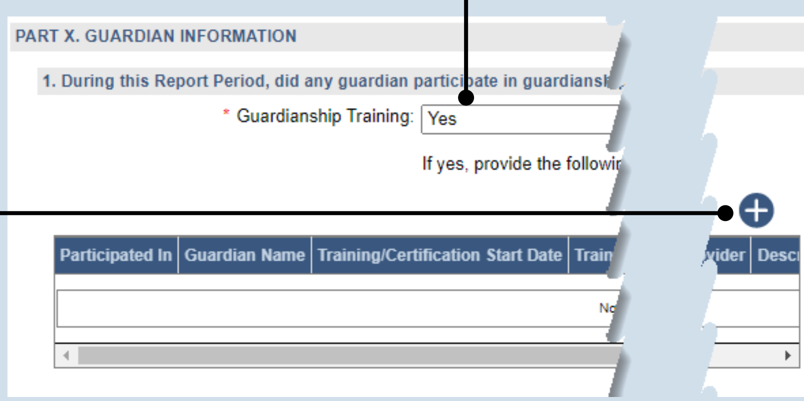
91. Part IX, #2 (cont.): ***Coverage & IP’s assets***
Click on the dropdown and select ‘Yes’ or ‘No’ to indicate if the liability coverage exceeds the total amount of the IP’s assets listed under Part V, Question #3.

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.

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.



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

95. Part X, #1 (cont.): *Select an option*

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

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.

97. Part X, #1 (cont.): *Training/ certification date*

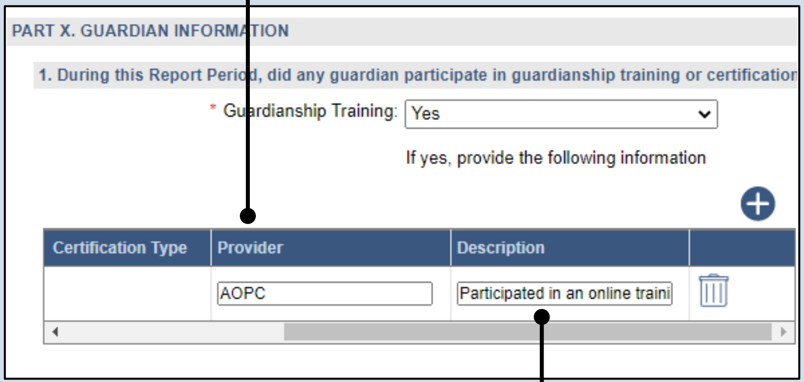
Use the **Training/ Certification Start** and **End Date** field to enter the dates that the training or certification took place.

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.

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.



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

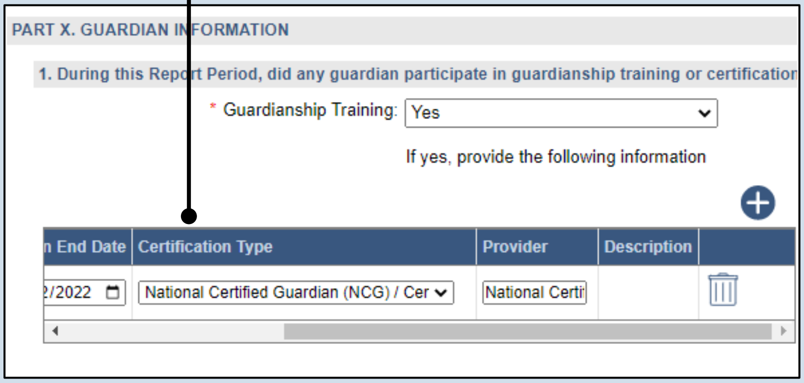
Click in the **Description** field and summarize the topics covered during the training.

Proceed to Step 101.

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.



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.

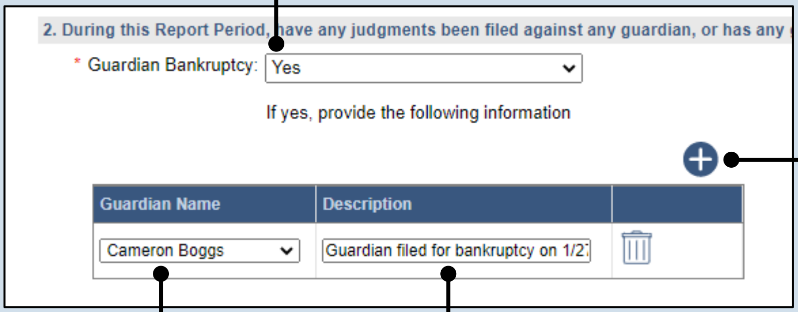
102. Part X, #2: Judgment or Bankruptcy?

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.



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.

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

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

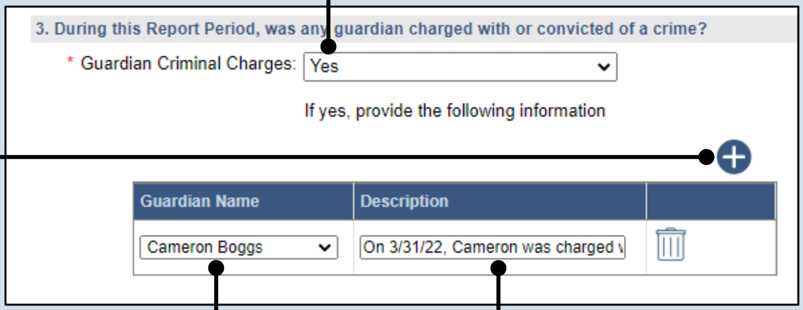
107. Part X, #3: Criminal activity?

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.

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



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.

110. Part X, #3 (cont.): *Description*

Click in the **Description** field and briefly summarize the nature of the crime.

111. Part X, #3 (cont.): *Add other charge*

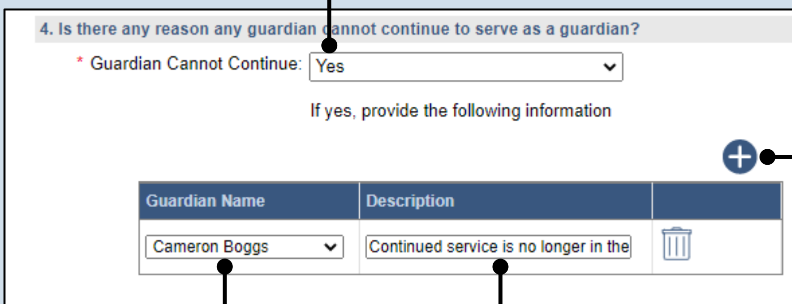
Repeat Steps 108-110 if any co-guardians were charged with or convicted of a crime.

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.

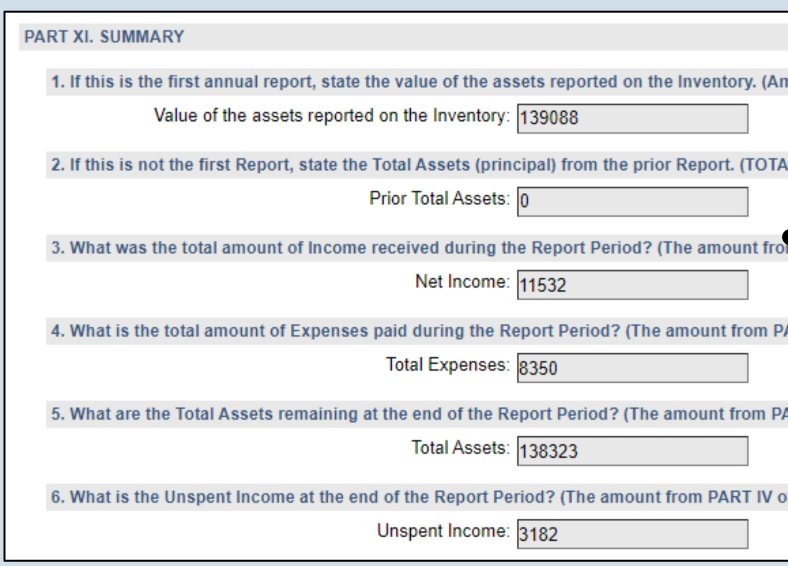


113. Part X, #4 (cont.): Click the Add Reason icon

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.



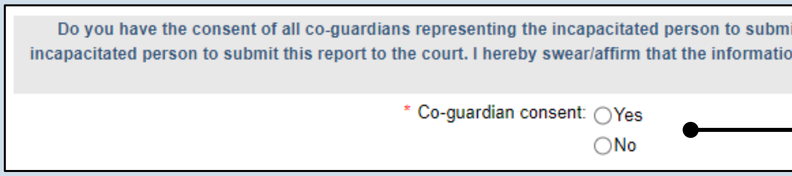
117. Part XI: *Summary*
Review the information in this section for accuracy. Each question refers to the source of each amount that displays. If something is incorrect, return to the appropriate section of this report to make the change or contact the court for assistance.

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.



Do you have the consent of all co-guardians representing the incapacitated person to submi
incapacitated person to submit this report to the court. I hereby swear/affirm that the informatio

* Co-guardian consent: Yes
No

119. Co-guardians (cont.):

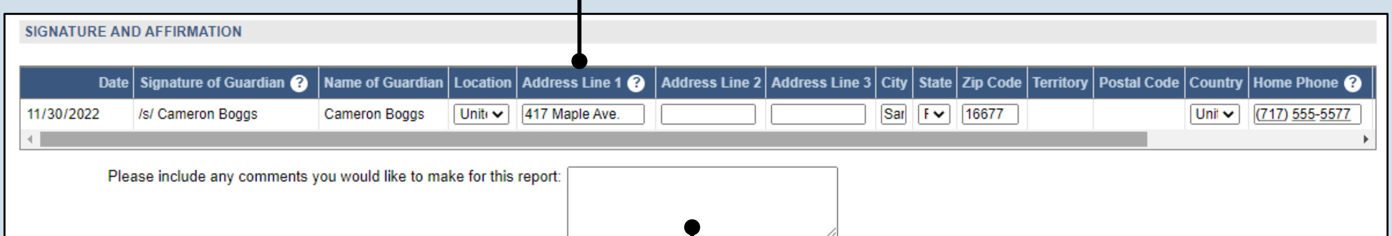
Select the **Yes** or **No** radio button to state whether the report is being submitted with the consent of all guardians.

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

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.



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.			Sar	F	16677			Uni	(717) 555-5577

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

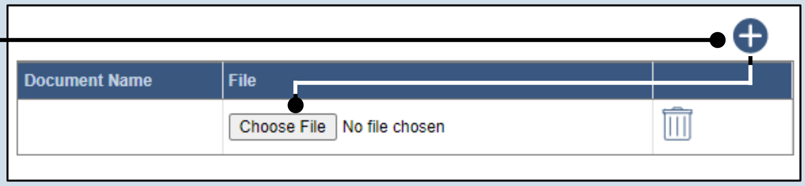
121. (Optional) Signature and Affirmation (cont.): *Comments*

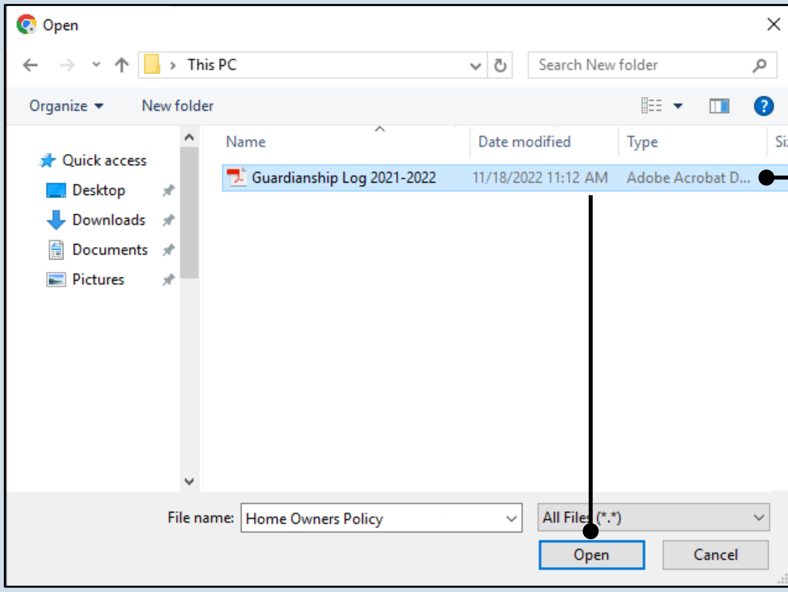
If you have any additional information that you want to provide to the court about the guardianship, enter them in the comments field provided.

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.





123. Signature and Affirmation (cont.): *Documents*

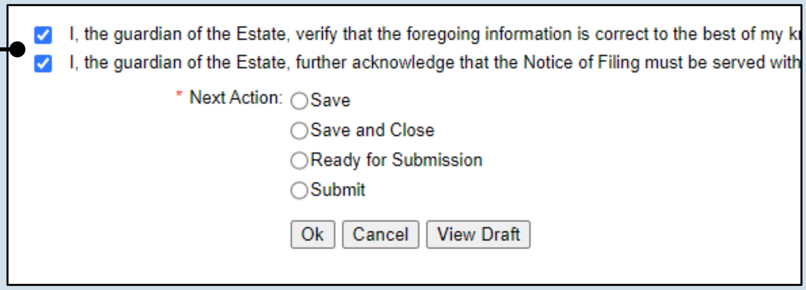
In the popup screen that appears, locate the PDF version of the document you have saved on your computer or a movable storage device. Select the file and click OPEN.

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.

124. Signature and Affirmation (cont.): *Checkboxes*

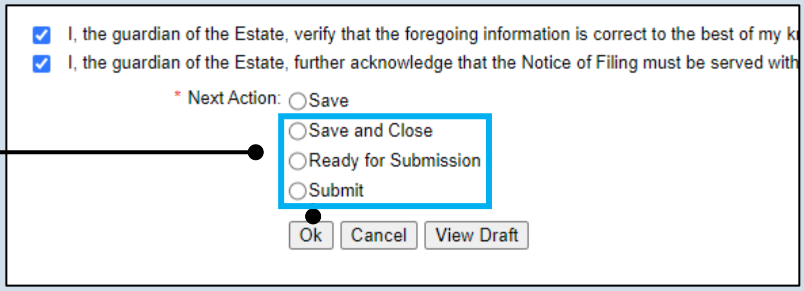
Read and select the checkboxes that indicate the information you provided is true and that you will serve a Notice of Filing to the other interested parties on the case.

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).



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).