

# eCourts Guardianship – Civil Release

## Notes

05-17-24

### Upload Document

<b>New</b>	A field for 'Net Estate Value' has been added to the screen when a Formal Accounting is uploaded. For more information, click <a href="#">here</a> .
<b>Fixed</b>	The date picker icon has been removed from the guardian profile. For more information, click <a href="#">here</a> .

### Report Review

<b>Fixed</b>	Bugs in the Audit description in Report Review have been fixed so that actions are accurately described. For more information, click <a href="#">here</a> .
<b>Enhanced</b>	Instructions have been added to the work area in the Follow-Ups tab. For more information, click <a href="#">here</a> .

### Institution Maintenance Table

<b>Fixed</b>	Fixes have been deployed to the maintenance table for management of institutional guardians. For more information, click <a href="#">here</a> .
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## Upload Document – Formal Accountings

'Net Estate Value' is now a required field when the document type "Formal Accounting" is uploaded. This enhancement improves the accuracy of the Net Estate Value in cases where Formal Accountings have been filed.

Formal Accountings will not be added to Report Review.

### Steps:

- 1) Select '**Formal Accounting**' from the 'Document Type' dropdown;
- 2) Enter '**Filed Date**';
- 3) Select the **guardian**;
- 4) Enter the **Net Estate Value\***;
- 5) **Upload** the Formal Accounting; and
- 6) Click '**Continue**'.

* Document Type:	* Filed Date:	* Guardian(s):	* Net Estate Value:
Formal Accounting	05/14/2024	KYLE KEARNY	82,876

**\*Note:** Enter "Ending Net Estate Value" from the Formal Accounting in the 'Net Estate Value' field. Please contact your GMP Program Coordinator with any questions.

The Net Estate Value entered at upload will be reflected in the 'Estate Value' table in Case Management.

eCOURTS HOME | **CASE MANAGEMENT** | UPLOAD DOCUMENT | CASE JACKET | User: susan.flynn

Case Search | Report Review

### Manage Case

▼ **Case Details** County Docket No.: 234556 [View Case Jacket](#)

County: OCEAN Status: ACTIVE Date Filed: 10/11/2023

► **Judgment** 01/01/2024

▼ **Estate Value** Initial Estate Value: \$ 82,345 Current Net Estate Value: **\$ 82,876**

Initial Estate Value:

Date	Estate Value	% Change	Transaction ID	Action	Last Modified By	Modified	Edit
05/14/2024	\$82,876	0.64	GMP20243558	Formal Accounting	susan.flynn		
02/14/2024	\$82,345	2.93	GMP20243557	Inventory Report	susan.flynn		
10/11/2023	\$80,000	N/A	GMP20243554	Certification of Assets	susan.flynn		

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## Removal of Date Picker Icon

The “date picker” (calendar icon) has been removed from the ‘Appointment Date’ field in the guardian profile. ‘Appointment Date’ is populated by upload of Qualifications Documents, making a date picker redundant on this field.

The screenshot shows a web form titled "Guardian Profile" with a red box highlighting the "Appointment Date" field. The form contains the following fields and options:

- Party Type:** dropdown menu
- First Name:** text input field
- Middle name:** text input field
- Last Name:** text input field with "ddd" entered
- Suffix:** dropdown menu
- Appointment Date:** text input field (highlighted with a red box)
- Alias:** button with a plus sign
- Qualification Required?:**  (Noticing will occur based on most recent Judgment Date value.)
- Is the Guardian an Attorney?:**  Yes  No
- Country:** dropdown menu (United States)
- Address Line 1:** text input field
- Address Line 2:** text input field
- City:** text input field
- State:** dropdown menu (NJ)
- Zip Code:** text input field with a zip icon
- Phone 1:** dropdown menu (United States(+1)) and text input field
- Phone 2:** dropdown menu (United States(+1)) and text input field
- Email Address 1:** text input field
- Email Address 2:** text input field
- Social Security Number:** three text input fields
- Date of Birth:** text input field with a calendar icon
- Relationship to IP:** dropdown menu
- Gender:** dropdown menu
- Interpreter Needed?:**  Yes  No
- Additional Profile Info:** text input field

At the bottom right of the form are "Back" and "Continue" buttons.

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## Report Review Audit

Fixes have been deployed to the Audit section in Report Review to more accurately reflect updates made in Case Management.

1) An update to the 'Initial Judgment Date' field displays only once:

### After the fix

Audit		Draft Notes
Time	Description	
05/15/2024 02:59 PM	'BondAmount' updated from 'N' to '55000'.	
05/06/2024 09:07 AM	'InitialJudgmentDate' updated from '05/17/2022' to '05/18/2022'.	
05/06/2024 09:06 AM	Review Status changed to New Report.	
05/06/2024 09:06 AM	New Report Review Created.	

### Prior to the fix

04/15/2021 04:06 PM	'InitialJudgmentDate' updated from '03/03/2021' to '03/04/2021'. 'BondAmount' updated from '4000' to ''.
04/15/2021 03:57 PM	'InitialJudgmentDate' updated from '03/03/2021' to '03/04/2021'. 'BondAmount' updated from '' to '4000'.

- 2) When the bond/amended bond is updated from 'No' to a number, or from a number to 'No' in Case Management, the Audit description captures 'N' instead of a blank:

**After the fix**

Audit		Draft Notes
Time	Description	
05/15/2024 02:59 PM	'BondAmount' updated from 'N' to '55000'.	

**Prior to the fix**

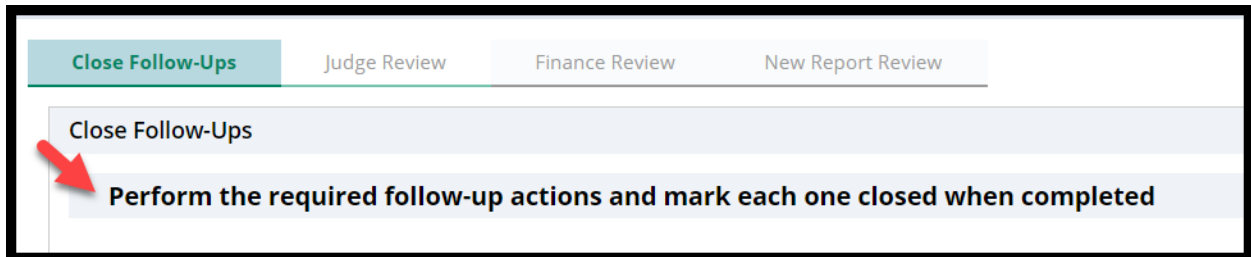
04/15/2021 04:06 PM	'InitialJudgmentDate' updated from '03/03/2021' to '03/04/2021'.	'BondAmount' updated from '4000' to ''.
04/15/2021 03:57 PM	'InitialJudgmentDate' updated from '03/03/2021' to '03/04/2021'.	'BondAmount' updated from '' to '4000'.

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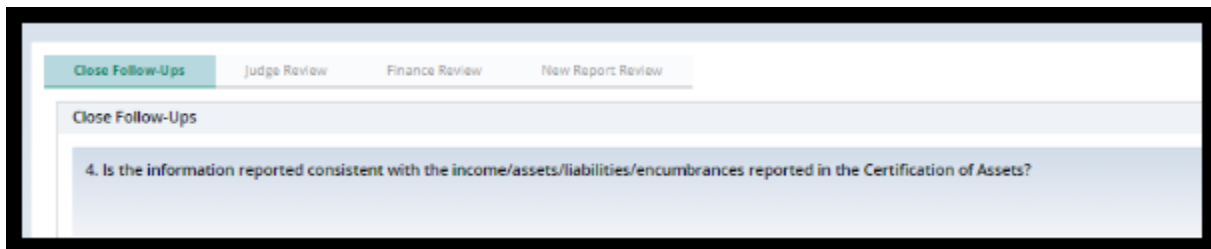
## Follow-Ups Tab Instructions

Instructions have been added to the work area in the Follow-Ups tab to provide guidance for users.

### After the enhancement:



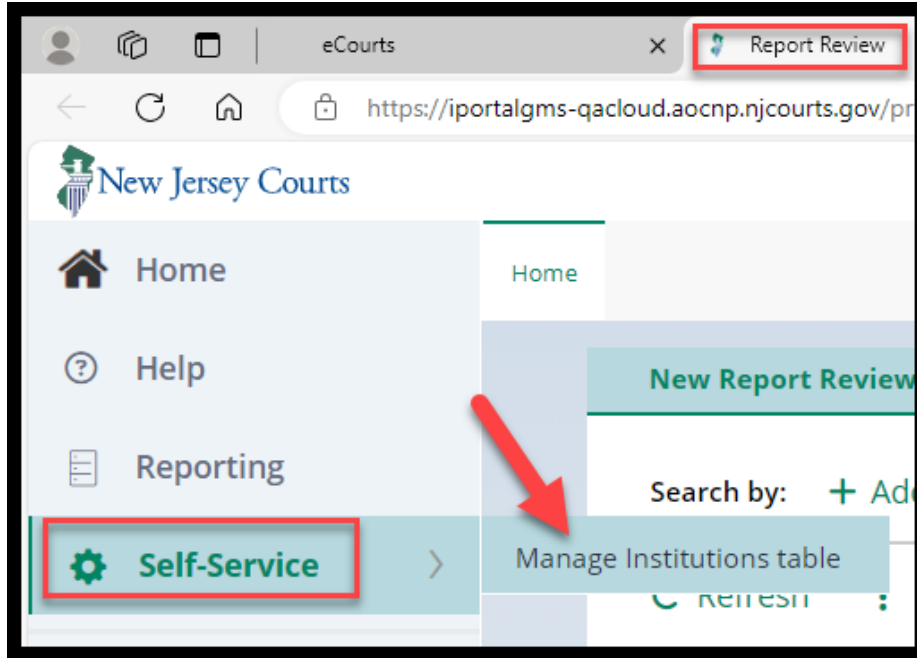
### Prior to the enhancement:



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## Institution Maintenance Table

A fix has been deployed to enable provisioned users to manage institutional guardians via a self-service table located in Report Review.



The table is now in a user-friendly format that allows users to search for, modify, and add institutions. Bulk upload is currently not available but this functionality may be added as a future enhancement.

**Search** by institution name or institution type:

A screenshot of the 'Manage Institutions Table' search interface. It features a 'Search by' label in a red box above two input fields: 'Institution Name' (a text box) and 'Institution Type' (a dropdown menu with 'Select..' as the current selection). 'Search' and 'Reset' buttons are located at the bottom right of the search area.

**Search by**

Institution Name  Institution Type

[Search](#) [Reset](#)

**Search Result(s)**

3 row(s) [Refresh](#)

Institution Name	Institution Type	Institution Status	Last modified by	Last modified date	
Volunteer Guardianship Services of Hunterdon County	Other	Active	shalinI.agarwal	05/07/2024	<a href="#">Open</a>
Volunteer Guardianship Services of Somerset County	Other	Invalid	shalinI.agarwal	05/08/2024	<a href="#">Open</a>
Volunteer Guardianship 101 of Hunterdon	Other	Invalid	susan.flynn	05/08/2024	<a href="#">Open</a>

Select 'Open' to **modify** an existing institution or click the **+ Add Institution** link to **add an institution**.

**Search Result(s)**

85 row(s) [Refresh](#)

Institution Name	Institution Type	Institution Status	Last modified by	Last modified date	
Not Listed	Other	Active	jeevagms	10/06/2023	<a href="#">Open</a>
Board of social welfare	County Board of Social Services	Invalid	shalinI.agarwal	05/06/2024	<a href="#">Open</a>
public welfare	County Board of Social Services	Invalid	susan.flynn	05/14/2024	<a href="#">Open</a>
Some-Institution-Inc Co	County Board of Social Services	Active	susan.flynn	05/08/2024	<a href="#">Open</a>
Add New Institution	Public Agency	Invalid	jeevagms	10/06/2023	<a href="#">Open</a>
WELLS FARGO	Qualified Financial Institution	Active	jeevagms	10/06/2023	<a href="#">Open</a>
Band of America II	Qualified Financial Institution	Invalid	shalinI.agarwal	05/07/2024	<a href="#">Open</a>
New Institution	Qualified Financial Institution	Invalid	jeevagms	10/06/2023	<a href="#">Open</a>
Del me	County Board of Adult Protective Services	Invalid	jeevagms	10/06/2023	<a href="#">Open</a>
s111111111111111111	Other	Invalid	jeevagms	10/06/2023	<a href="#">Open</a>

1 2 3 4 5 6 7 8 9 >

[+ Add Institution](#)

To make updates, select '**Modify**' and save your changes.

**Institution Information**

Institution Name *	Institution Status	Institution Type *
Volunteer Guardianship Services of Hunterdon County	Active	Other

[Modify](#)

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**Address Information**

Address 1 *	Address 2	City *	States *
1 Main St	saAasajSHak AK%\$#^%a; ajsajD;lajd&	Flemington	AC
ZipCode *			
08822			

[Modify](#)

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**Contact Information**

Email Address 1	Email Address 2	Phone Work	Phone Work Extn
		---	---
Phone Home	Phone Cell	Phone Other	Fax
---	---	---	---

[Modify](#)

To **add** a new institution, complete the required fields and click 'Save'.

**Add an Institution Record**

**Institution Information**

Institution Name *	Institution Status	Institution Type *
<input type="text"/>	Active	Select..

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**Address Details**

Address 1 *	Address 2	City *	States *
<input type="text"/>	<input type="text"/>	<input type="text"/>	New Jersey
ZipCode *			
<input type="text"/>			

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**Contact Details**




Email Address 1	Email Address 2	Phone Work	Phone Work Extn
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Phone Home	Phone Cell	Phone Other	Fax
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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# eCourts Guardianship Report Review – Civil Release Notes

04-12-2024

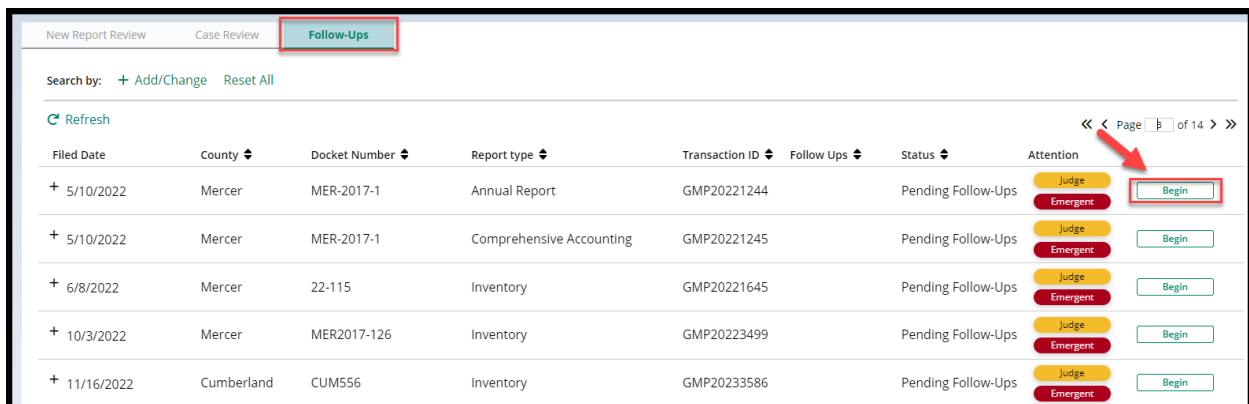
## Report Review

	Template documents are now available in the Follow-Ups tab for use in completing follow-up actions. For more information, click <a href="#">here</a> .
	The Follow-Ups tab workbasket has been enhanced to include additional filters and icons. For more information, click <a href="#">here</a> .
	The Case Review tab workbasket has been enhanced to include additional filters. For more information, click <a href="#">here</a> .

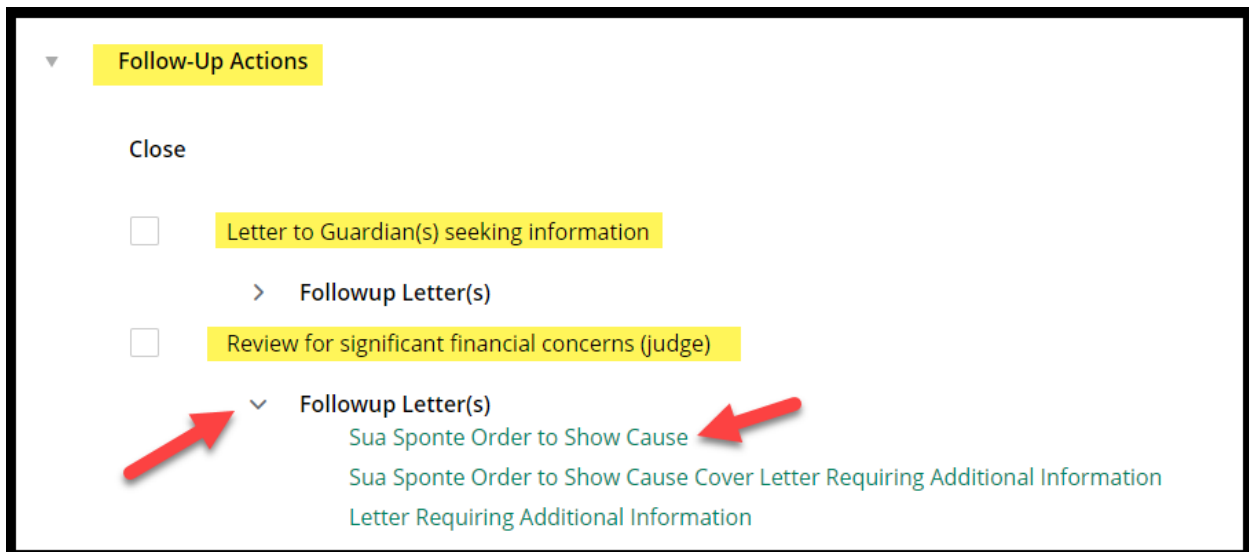
## Templates Available in Follow-Ups Tab

To facilitate the completion of follow-up actions, template documents have been added to Report Review. Users now have uniform, approved templates for use in completing the follow-ups with guardians.

The system dynamically displays the templates based on the follow-up action specified by the reviewer. The documents appear as links and open into Word so they can be tailored as needed. Users will then mail or email the documents to the appropriate parties.



Filed Date	County	Docket Number	Report type	Transaction ID	Follow Ups	Status	Attention
+ 5/10/2022	Mercer	MER-2017-1	Annual Report	GMP20221244		Pending Follow-Ups	Judge Emergent <a href="#">Begin</a>
+ 5/10/2022	Mercer	MER-2017-1	Comprehensive Accounting	GMP20221245		Pending Follow-Ups	Judge Emergent <a href="#">Begin</a>
+ 6/8/2022	Mercer	22-115	Inventory	GMP20221645		Pending Follow-Ups	Judge Emergent <a href="#">Begin</a>
+ 10/3/2022	Mercer	MER2017-126	Inventory	GMP20223499		Pending Follow-Ups	Judge Emergent <a href="#">Begin</a>
+ 11/16/2022	Cumberland	CUM556	Inventory	GMP20233586		Pending Follow-Ups	Judge Emergent <a href="#">Begin</a>



**Follow-Up Actions**

Close

- Letter to Guardian(s) seeking information
  - > Followup Letter(s)
- Review for significant financial concerns (judge)
- Followup Letter(s)
  - Sua Sponte Order to Show Cause
  - Sua Sponte Order to Show Cause Cover Letter Requiring Additional Information
  - Letter Requiring Additional Information



**BY THE COURT**



SUPERIOR COURT OF NEW JERSEY  
CHANCERY DIVISION: PROBATE PART  
CUMBERLAND, COUNTY

In the Matter of  
Harvey Herve, an  
Incapacitated Person

DOCKET NUMBER: 098765

Civil Action

**ORDER TO SHOW CAUSE**



**THIS MATTER** being brought before the Court by the New Jersey Judiciary Guardianship Monitoring Program (GMP), and GMP having performed a review of the guardianship case file of Harvey Herve, an adjudicated incapacitated person (“the incapacitated person”);

IT IS on this \_\_\_\_\_ day of \_\_\_\_\_, *qua sponte* ORDERED that the

For more detailed information, refer to the Quick Reference Guide – eCourts Guardianship Follow-Up Templates.

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## Follow-Ups Tab Workbasket Enhancement

The Follow-Ups tab workbasket has been enhanced with new filters and icons. These enhancements allow users to easily distinguish between reviews that have come from Judge Review and those from Final Review.

### Steps:

- 1) Click **Add/Change**
- 2) Select **Attention** from search criteria
- 3) Select-
  - a. **"Last Review - Judge"** for reviews that came from Judge Review
  - b. **"Last Review - Final"** for reviews that came from Final Review
- 4) In the **'Attention'** column, an icon labeled "Judge" or "Final" appears, as appropriate

The screenshot shows the 'Follow-Ups' tab selected in the top navigation bar. Below the navigation bar, there is a search bar with a red circle '1' and an arrow pointing to the '+ Add/Change' button. A 'Search and Filter' dialog box is open, showing a dropdown menu for 'Search Criteria' with 'Attention' selected, and a dropdown menu for 'Attention' with 'Last Review - Judge' selected. Red arrows and numbers 2 and 3 indicate the selection process. The background shows a table with columns: Filed Date, County, Docket Number, Report type, Transaction ID, and Follow-Ups.

The screenshot shows the search results for 'Attention: Last Review - Judge'. The search bar now displays 'Attention: Last Review - Judge X'. The table has a new column 'Attention' with 'Judge' icons. A red arrow and number 4 point to the 'Judge' icon in the first row. The table also includes a 'Follow Ups' column and a 'Begin' button for each row. The bottom right corner shows pagination: 'Page 1 of 8'.

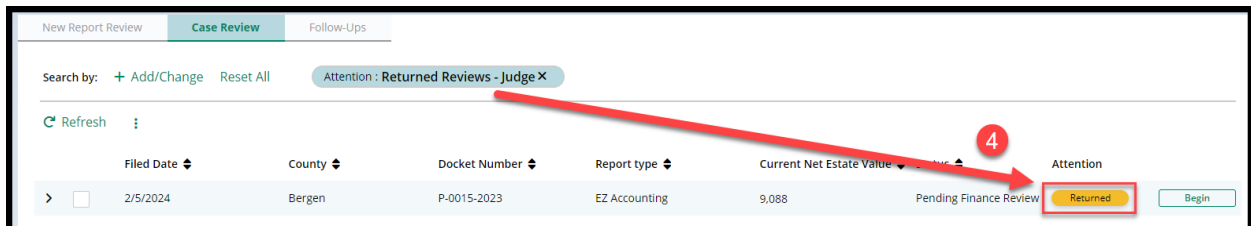
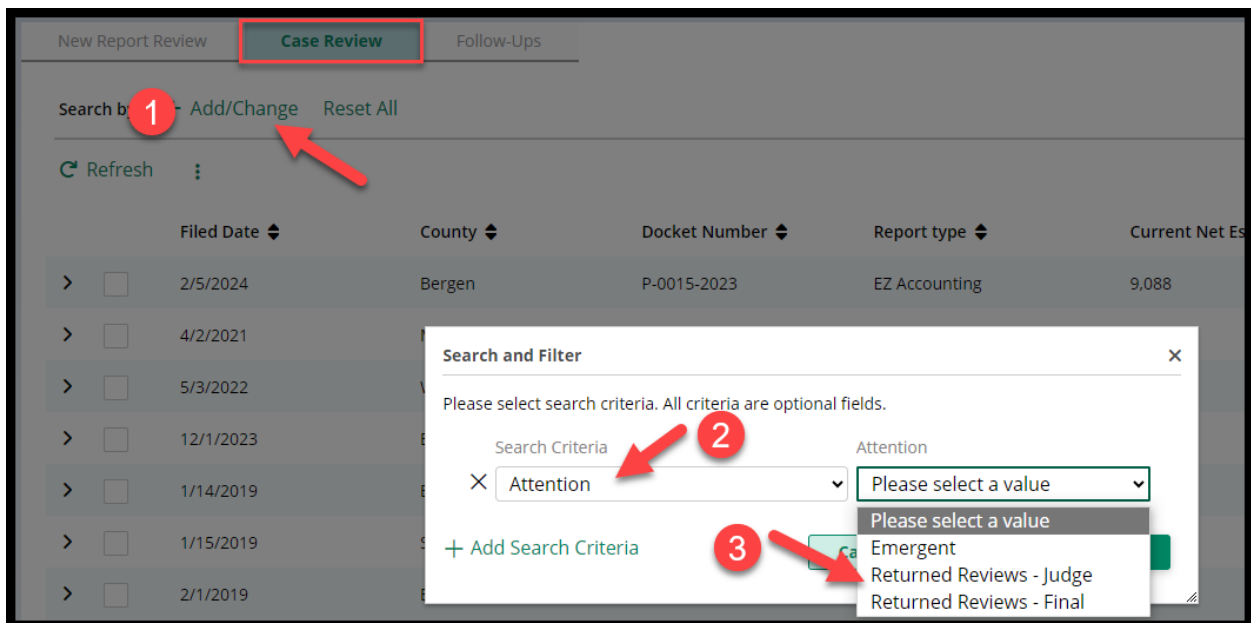
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## Case Review Tab Workbasket Enhancement

The Case Review tab workbasket has been enhanced with new filters. These enhancements allow users to easily distinguish between reviews that have been returned to Finance Review from Judge Review and those from Final Review.

### Steps:

- 1) Click **Add/Change**
- 2) Select **Attention** from search criteria
- 3) Select-
  - a. **"Returned Reviews - Judge"** for reviews that came from Judge Review
  - b. **"Returned Reviews - Final"** for reviews that came from Final Review
- 4) In the '**Attention**' column, an icon labeled "Returned" appears



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# eCourts Guardianship – Civil Release

## Notes

04/03/2024

### Noticing

Fixed

A fix has been deployed to ensure that active IP attorneys receive overdue notices. For more information, click [here](#).



# eCourts Guardianship Civil Release

## Notes

03/15/2024

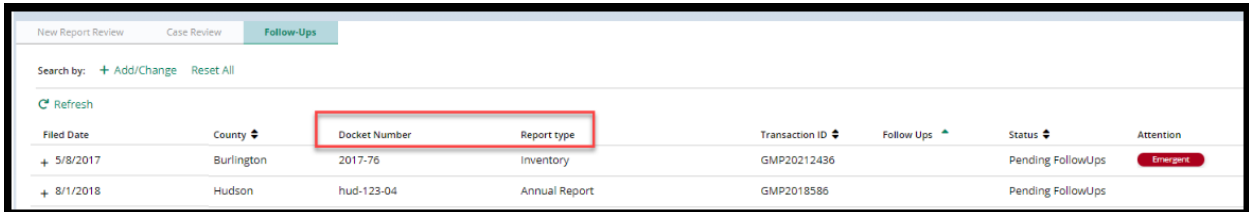
### Report Review

<b>Enhanced</b>	Report Review has been enhanced to allow sorting on all columns in the Follow-Ups tab.
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### Follow-Ups Tab Sort

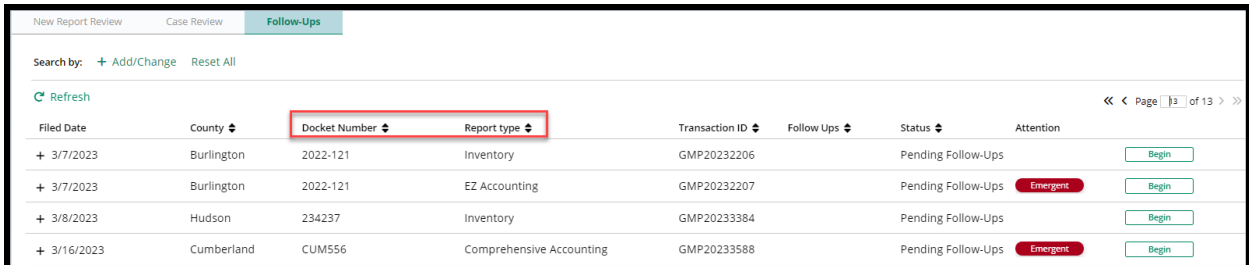
Users can now sort by docket number and report type in the Follow-Ups tab.

Prior to enhancement:



Filed Date	County	Docket Number	Report type	Transaction ID	Follow Ups	Status	Attention
+ 5/8/2017	Burlington	2017-76	Inventory	GMP20212436		Pending FollowUps	Emergent
+ 8/1/2018	Hudson	hud-123-04	Annual Report	GMP2018586		Pending FollowUps	

After enhancement:



Filed Date	County	Docket Number	Report type	Transaction ID	Follow Ups	Status	Attention
+ 3/7/2023	Burlington	2022-121	Inventory	GMP20232206		Pending Follow-Ups	Begin
+ 3/7/2023	Burlington	2022-121	EZ Accounting	GMP20232207		Pending Follow-Ups	Emergent Begin
+ 3/8/2023	Hudson	234237	Inventory	GMP20233384		Pending Follow-Ups	Begin
+ 3/16/2023	Cumberland	CUM556	Comprehensive Accounting	GMP20233588		Pending Follow-Ups	Emergent Begin

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# eCourts Guardianship Civil Release

## Notes

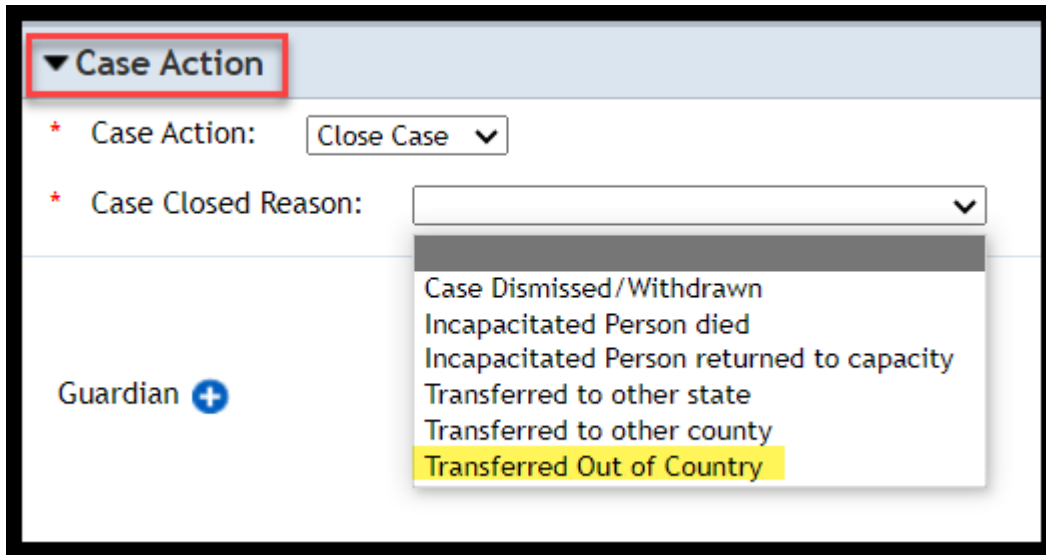
11/17/2023

### Case Management

 A green rectangular button with rounded corners and a white border, containing the word "Enhanced" in white text.	'Case Action' has been enhanced to permit users to capture the date and country of transfer when a case is closed after being transferred to another country. For more information, click <a href="#">here</a> .
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## Case Management

When a case is closed because it has been transferred to another country, users can now capture the date and the country of new jurisdiction.



A screenshot of a software interface showing a dropdown menu for 'Case Action'. The menu is open, displaying several options. The option 'Transferred Out of Country' is highlighted in yellow. The other options are 'Case Dismissed/Withdrawn', 'Incapacitated Person died', 'Incapacitated Person returned to capacity', and 'Transferred to other state'. The dropdown is triggered by a 'Case Closed Reason' field.

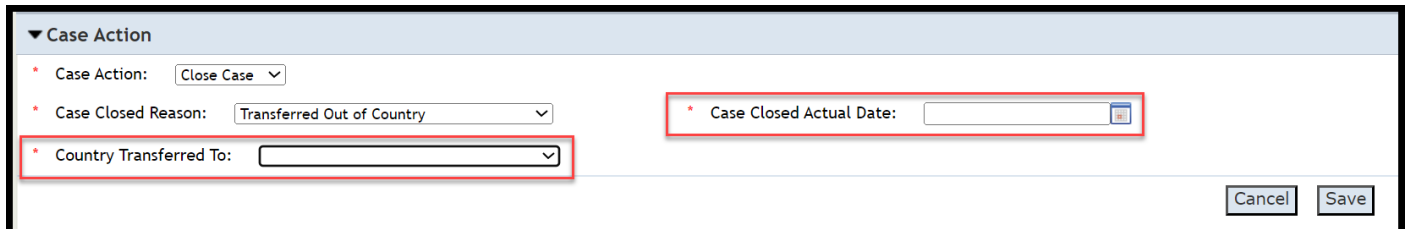
▼ Case Action

\* Case Action: Close Case ▼

\* Case Closed Reason: ▼

- Case Dismissed/Withdrawn
- Incapacitated Person died
- Incapacitated Person returned to capacity
- Transferred to other state
- Transferred to other country
- Transferred Out of Country

Guardian +



A screenshot of a software interface showing the 'Case Action' form. The form has three main fields: 'Case Action' (set to 'Close Case'), 'Case Closed Reason' (set to 'Transferred Out of Country'), and 'Country Transferred To' (empty). The 'Case Closed Actual Date' field is also present and is highlighted with a red box. The 'Country Transferred To' field is also highlighted with a red box. The form includes 'Cancel' and 'Save' buttons at the bottom right.

▼ Case Action

\* Case Action: Close Case ▼

\* Case Closed Reason: Transferred Out of Country ▼

\* Case Closed Actual Date: [Date Picker]

\* Country Transferred To: ▼

Cancel Save

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# eCourts Guardianship Civil Release

## Notes

10/20/2023

### Noticing

	A fix has deployed so that the noticing program can differentiate between guardians with the same first and last names. For more information, click <a href="#">here</a> .
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### Case Management

	'Case Action' has been enhanced to include a new reason for closing a case. For more information, click <a href="#">here</a> .
	A fix has been deployed to ensure that the 'Supplemental Inventory Required' field is populated when multiple documents are uploaded along with an Amended Judgment. For more information, click <a href="#">here</a> .

### Report Review

	A fix has been deployed to dynamically close all reports in Report Review in real time when a case is closed by uploading an IP Death Certificate. For more information, click <a href="#">here</a> .
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## Noticing

The noticing program has been enhanced to allow the program to differentiate between guardians with the same first and last names. Previously, if guardians had the same names, distinguished only by a suffix (such as "Jr."), only 1 notice would go out.

Going forward, the noticing program will consider additional fields so that noticing will be accurate.

**Example:** previously, one notice would have been sent for these 2 guardians. Now, each will receive a separate notice.

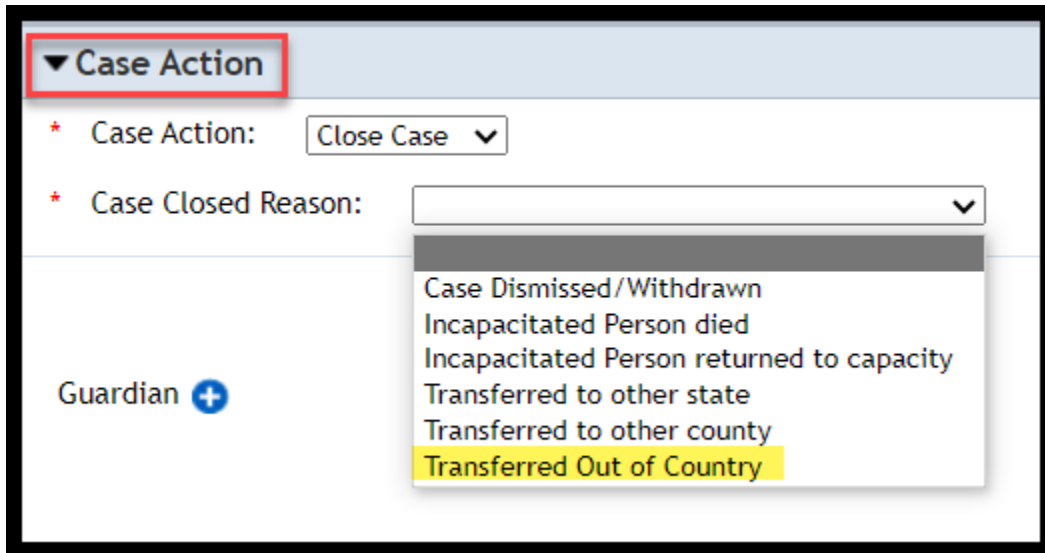
eCOURTS HOME	CASE MANAGEMENT	UPLOAD DOCUMENT	CASE JACKET	User: susan.flynn
Case Search	Report Review			
Manage Case				
▼ Case Details	County Docket No.: cp-0776-2022			<a href="#">View Case Jacket</a>
County: CAMDEN	Status: ACTIVE	Date Filed: 04/12/2022		
▶ Judgment	07/07/2022			
▶ Estate Value	Initial Estate Value: \$ 987	Current Net Estate Value: \$ 987		
▶ Incapacitated Person (IP) Profile	JASPER JONAS	STATUS: ACTIVE		
▶ IP Attorney Profile	TEST ERIC BRAND III	STATUS: ACTIVE		
▶ Guardian Profile	JACKSON A JONAS JR	Appointment Date:	STATUS: ACTIVE	
▶ Guardian Profile	JACKSON A JONAS SR	Appointment Date:	STATUS: ACTIVE	
▶ Case Action				
Guardian				
				<input type="button" value="Find New Case"/>

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# Case Management

## Case Action

'Case Action' has been enhanced to include a new reason for closing a case: "Transferred Out of Country":



**Note:** this enhancement is being deployed in two pieces. The next deployment will include required fields for: 1) entry of the 'Actual Case Closed Date'; and 2) selection of country the case was transferred to (dropdown).

In the meantime, the database will capture the case closed reason and the date the case was closed.

## Judgment Accordion

A fix has been deployed to ensure that the 'Supplemental Inventory Required' field is always populated when an Amended Judgment is uploaded.

Previously, if multiple documents were uploaded along with the Amended Judgment, the 'Supplemental Inventory Required' field was left blank.

The screenshot shows the 'Manage Case' interface for County Docket No. 4033-17. The 'Judgment' section is expanded, showing the following details:

- County: BURLINGTON
- Status: ACTIVE
- Date Filed: 07/12/2017
- Judgment Date: 09/14/2017
- Initial Judgment Date: 09/14/2017
- Verified Complaint Filed Date: 07/12/2017
- Amended Judgment Date: 07/20/2022 (Most recent)
- Guardianship Type:  Person,  General (Plenary),  Limited
- Noticing Date: 09/14/2017
- Inventory Required:  Yes,  No
- Supplemental Inventory Required:  Yes,  No
- Annual Report?:  Yes,  No (Primarily used for backloading.)

### Prior to the fix:

The screenshot shows the 'Manage Case' interface for County Docket No. [REDACTED]. The 'Judgment' section is expanded, showing the following details:

- County: MERCER
- Status: ACTIVE
- Date Filed: 12/24/2012
- Judgment Date: 04/12/2013
- Initial Judgment Date: 04/12/2013
- Verified Complaint Filed Date: 12/24/2012
- Amended Judgment Date: 05/16/2023 (Most recent)
- Guardianship Type:  Person,  General (Plenary),  Limited
- Noticing Date: 05/16/2023
- Inventory Required:  Yes,  No
- Supplemental Inventory Required:  Yes,  No

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## Report Review

A fix has been deployed so that when a case is closed by upload of the document type "IP Death Certificate", all report reviews are dynamically closed and removed from the work basket in real time.

Prior to the fix, the reviews were closed overnight. The fix increases efficiency by ensuring that only reviews on open cases remain in the workbasket.

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# eCourts Guardianship Civil Release Notes 09/29/2023

## Report Review

Enhanced

Three tables have been exposed to Program Coordinator and ATCSU users to facilitate the update of probate judges, surrogates, and institutions. For more information, click [here](#).

## Case Management

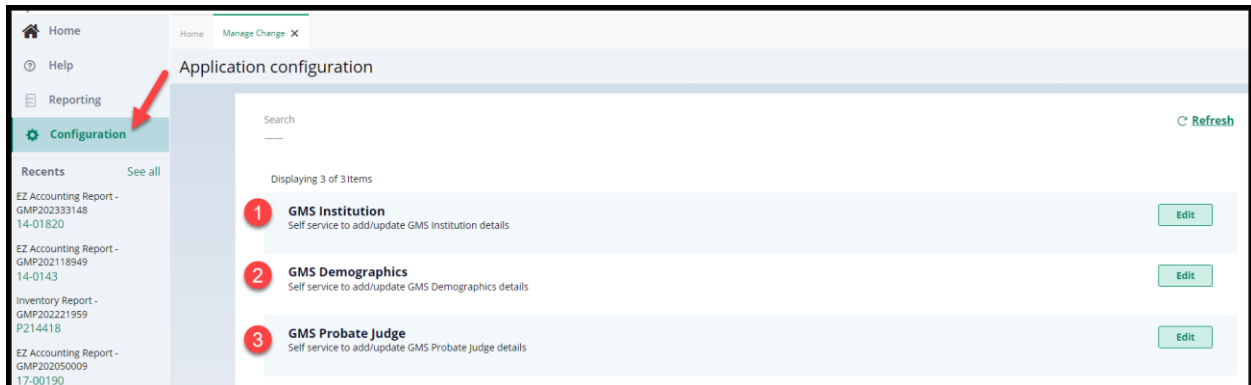
Enhanced

Security has been added to Case Actions to prevent accidental deletion of cases. For more information, click [here](#).

## Self-Service Tables Now Available in Report Review

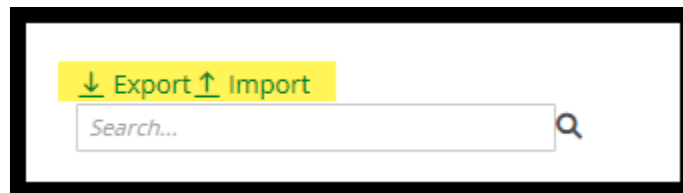
To facilitate necessary updates to the: 1) probate judge dropdown; 2) institution dropdown; and 3) demographic information for notices, three tables have been made available for Program Coordinator and ATCSU users.

To access the tables, click on 'Configuration' in the left navigation menu in Report Review.



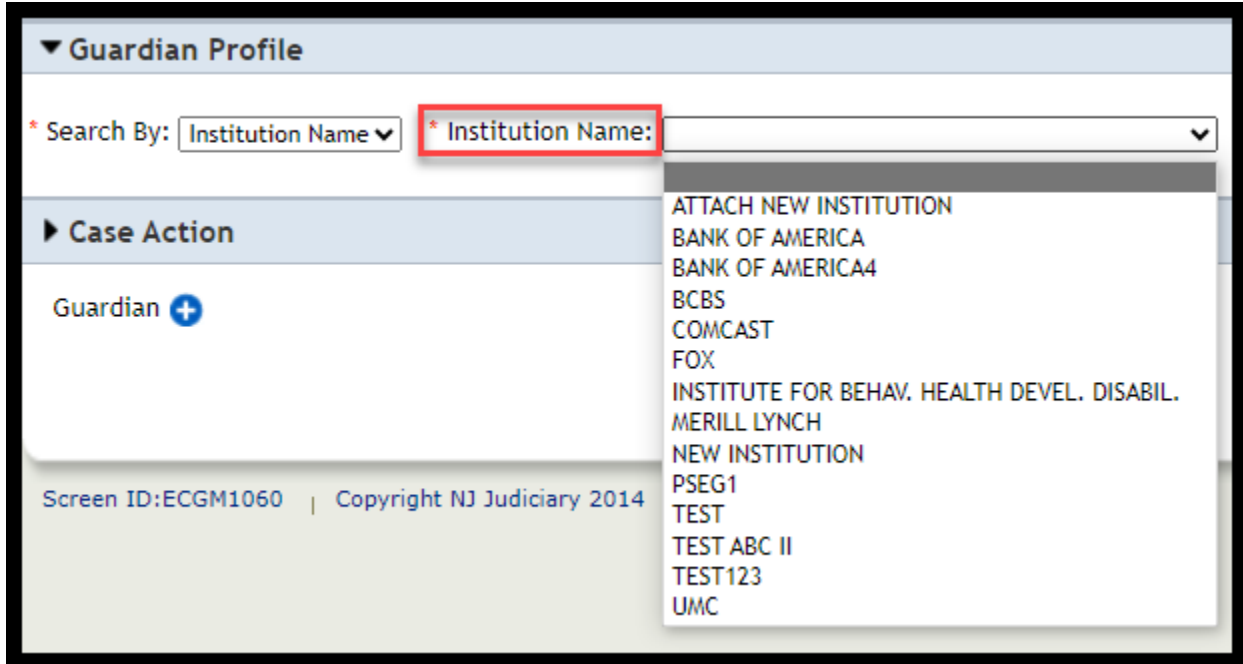
### Note:

- These tables directly update production
- There are no validations for characters or spelling
- The import feature is currently not working and *cannot be utilized*
- Export does work and can be used to produce a spreadsheet



## GMS Institution Table

This table is for managing institutions in the dropdown during guardian profile creation.



### To make an edit to an existing entry:

- 1) Click the entry
- 2) Make the update
- 3) Click away from the line
- 4) Production will be updated (may require a user to click out of the case and go back in)

The screenshot shows the 'GMS Institution' table. The table has columns for INS\_INSTITUTION\_ID, INS\_INSTITUTION\_NAME, INS\_INSTITUTION\_TYPE\_CD, INS\_INSTITUTION\_STATUS\_CD, ADDRESS\_1, ADDRESS\_2, City, STATE\_CD, ZipCode, PHONE\_HOME, PHONE\_CELL, PHONE\_WORK, and PHONE. The second row is highlighted with a red arrow pointing to the 'INS\_INSTITUTION\_NAME' column.

INS_INSTITUTION_ID	INS_INSTITUTION_NAME	INS_INSTITUTION_TYPE_CD	INS_INSTITUTION_STATUS_CD	ADDRESS_1	ADDRESS_2	City	STATE_CD	ZipCode	PHONE_HOME	PHONE_CELL	PHONE_WORK	PHONE
1	Bank of America	FI	ACT	1300 Merrill Lynch Drive		Pennington	NJ	7654	7324566567			
2	Bank of America23	FI	ACT	1300 Merrill Lynch Drive	test	Pennington	NJ	76506786	4564565465	7897897897	5467546546	
3	Bank of America33	FI	IVL	1300 Merrill Lynch Drive	test	Pennington	NJ	85367560				
4	Bank of America4	FI	ACT	1300 Merrill Lynch Drive	test	Pennington	NJ	853675600	2342342342	2342342342	2342342342	23423



**GMS Institution**

Self service to add/update GMS Institution details

↓ Export ↑ Import

Search...

INS_INSTITUTIO...	INS_INSTITUTION_NAME	INS_INSTITUTION_TYPE_CD	INS_INSTITUTION_STATUS_CD
1	Bank of America	FI	ACT
2	Bank of America23	FI	ACT
3	Bank of America33	FI	ACT
4	Bank of America4	FI	ACT

After the update, click away from the entry

Update displays:

\* Institution Name:

- ATTACH NEW INSTITUTION
- BANK OF AMERICA
- BANK OF AMERICA33**
- BANK OF AMERICA4
- BCBS
- COMCAST
- FOX
- INSTITUTE FOR BEHAV. HEALTH DEVEL. DISABIL.
- MERILL LYNCH
- NEW INSTITUTION
- PSEG1
- TEST
- TEST ABC II
- TEST123
- UMC

## To add a new institution:

Scroll to the end of the list and click "Add Record":

- 1) Complete the fields
- 2) Only institution number is required
- 3) Click away from the entry
- 5) Production will be updated (may require a user to click out of the case and go back in)

77	DFGDG	PG	IVL
78	derertert	PG	IVL
79	derertert	PG	IVL
80	derertert	PG	IVL
81	derertert	PG	IVL
82	derertert	PG	IVL
83	derertert	PG	IVL
84	public defender	PG	ACT
85	Institute for Behav. Health & Devel. Disabil.	PG	ACT
86	Institute for Behav. Health & Devel. Disabil.	PG	ACT
87	ABCD1 INC	FI	IVL
88	ABCD1 INC	FI	IVL
89	ABCD1 INC	FI	IVL
90	ABCD1 INC	FI	IVL
91	ABCD1 INC	FI	IVL
92	Stanley Morgart	FI	ACT

+ Add record

## Note:

- Duplicate institution numbers throw an error
- Statuses:
  - ACT - will display in the dropdown
  - IVL - will not display in the dropdown
- List of institution types:
  - County Board of Social Service (SS)
  - Hospital (HP)
  - Public Agency (PG)
  - Qualified Financial Institution (FI)
  - Other (OT)

## GMS Probate Judge Table

This table is for managing the judges that display in the judge dropdown in Case Management.

\* Judge Name: DIBIASI, DARREN T

Judgment Comments:

▶ Estate Value

▶ Incapacitated Person (IP) P

▶ IP Attorney Profile

ADUBATO, LISA M  
BALLARD, ROBERT A JR  
BARTELS, PATRICK J  
BAUMAN, DAVID F  
BERMAN, GLENN J  
BUCZYNSKI, FRANK A  
CARROLL, HARRY G  
CATUOGNO, CAROL  
CAVANAGH, THOMAS W JR  
CHASE, MARK  
CIUFFANI, FRANK M  
CLEARY, PATRICIA DELBUENO  
COLALILLO, MARY EVA  
CONFORTI-PAN, J PETER III

GMS Probate Judge

Self service to add/update GMS Probate Judge details

Export Import

Search

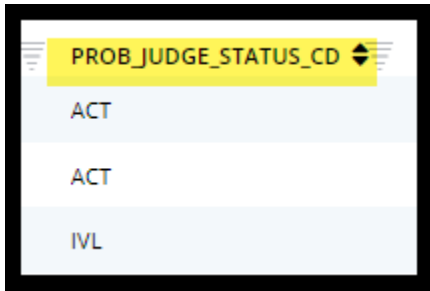
PROB_JUDGE_ID...	PROB_JUDGE_LAST_NAME	PROB_JUDGE_FIRST_NAME	PROB_JUDGE_MIDDLE_NAME	PROB_PHONE	PROB_JUDGE_COUNTY_CD	PROB_JUDGE_PREFIX_CD	PROB_JUDGE_SUFFIX_CD	PROB_JUDGE_DESC	PROB_JUDGE_STATUS_CD	PROB...
1	COYLE	JOHN	J	9082317647	HNT	HON	JR	J.S.C.	ACT	781

This table works the same way as the institution table with a ***few differences***:

- 1) The "PROB\_JUDGE\_SEQ\_NUM" column is from the legacy system and can be ignored

PROB_JUDGE_SEQ_NUM
781
737

2) **Both** ACT and IVL status judges display in the dropdown



## GMS Demographics Table

This table controls the judge and surrogate contact information that displays in the overdue notices. It functions the same way as the other tables.

Because the import feature is not available, all updates must be completed manually, one at a time.

GMS Demographics

Self service to add/update GMS Demographics details

[Export](#) [Import](#)

Search...

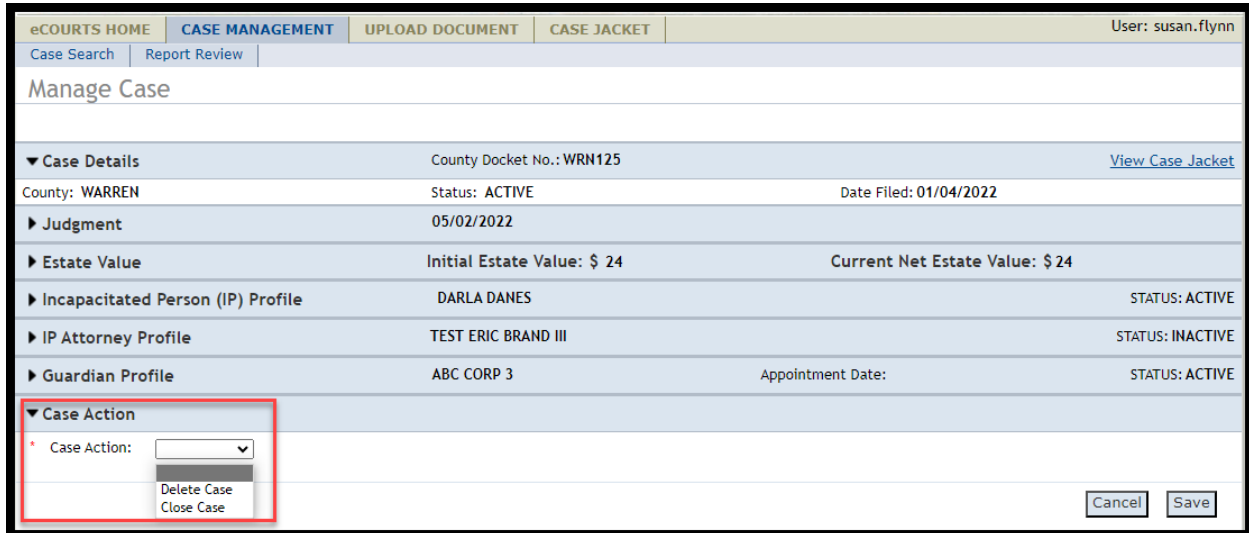
DEMOGRAPHICS...	DEMOGRAPHICS_TYPE	DEMOGRAPHICS_VENUE_ALPH	DEMOGRAPHICS_NAME	DEMOGRAPHICS_ADDRESS_1	DEMOGRAPHICS_ADDRESS_2	DEMOGRAPHICS_CITY	DEMOGRAPHICS_STATE
1	SRG	ATL	James Curcio, Surrogate	Atlantic County Courts Bldg.	5911 Main Street	Mays Landing	NJ

[\(Back\)](#)

## Case Action Security

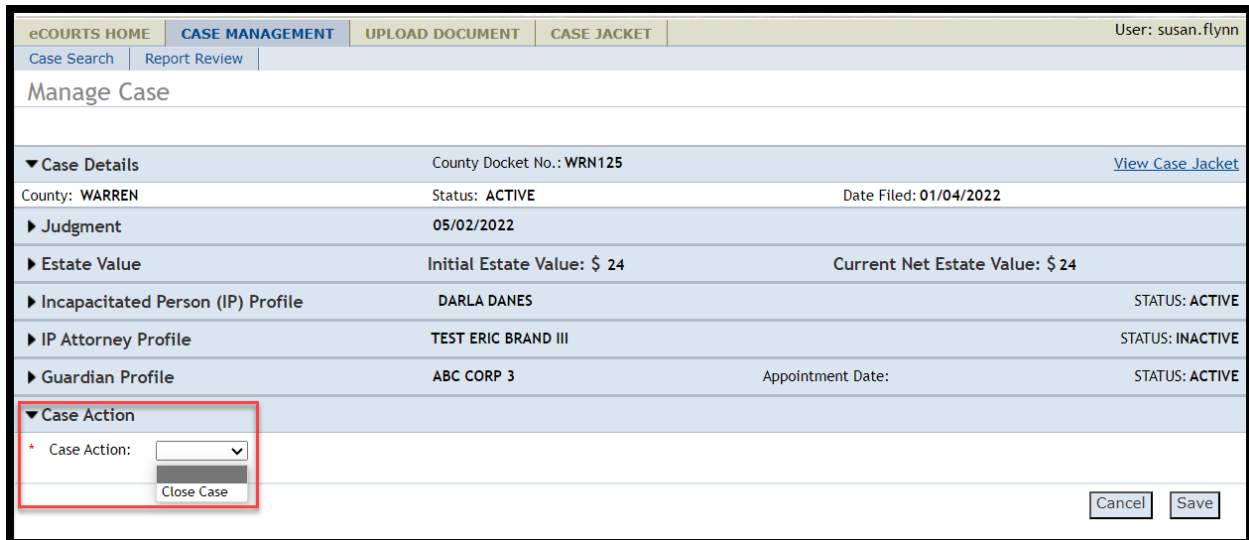
Security has been implemented in 'Case Actions' to prevent accidental deletion of cases from Case Management. Only PRC and ATC users have the option to delete a case.

PRC and ATC users:



The screenshot shows the 'Manage Case' interface for a user named susan.flynn. The interface includes a navigation bar with 'eCOURTS HOME', 'CASE MANAGEMENT', 'UPLOAD DOCUMENT', and 'CASE JACKET'. Below the navigation bar, there are tabs for 'Case Search' and 'Report Review'. The main content area is titled 'Manage Case' and displays case details for County Docket No.: WRN125. The details include County: WARREN, Status: ACTIVE, Date Filed: 01/04/2022, Judgment: 05/02/2022, Estate Value: Initial Estate Value: \$ 24, Current Net Estate Value: \$ 24, Incapacitated Person (IP) Profile: DARLA DANES (STATUS: ACTIVE), IP Attorney Profile: TEST ERIC BRAND III (STATUS: INACTIVE), and Guardian Profile: ABC CORP 3 (Appointment Date: , STATUS: ACTIVE). The 'Case Action' dropdown menu is open, showing 'Delete Case' and 'Close Case' options. The 'Delete Case' option is highlighted, indicating it is available to PRC and ATC users. There are 'Cancel' and 'Save' buttons at the bottom right of the interface.

All other users:



The screenshot shows the 'Manage Case' interface for a user named susan.flynn. The interface is identical to the one above, but the 'Case Action' dropdown menu is open, showing only the 'Close Case' option. This indicates that users other than PRC and ATC users do not have the option to delete a case. There are 'Cancel' and 'Save' buttons at the bottom right of the interface.

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# eCourts Guardianship Civil Release

## Notes

### 09/01/2023

#### Case Management

 A green button with the word "Enhanced" in white text.	<p>The inventory and supplemental inventory fields have been shifted so that all reporting fields are organized together in the 'Judgment' accordion. For more information, click <a href="#">here</a>.</p>
--	---

## All Reporting Fields Are Grouped Together in Case Management

To make the user interface more cohesive, all reporting fields are organized in an unbroken grouping in the 'Judgment' accordion in the Case Management tab.

This enhancement is retroactive.

Prior to the enhancement:

The screenshot shows a 'Judgment' form for a case dated 06/15/2022. The form is divided into several sections. At the top, there are date fields for 'Initial Judgment Date' (06/15/2022), 'Verified Complaint Filed Date' (03/08/2022), and 'Amended Judgment Date' (06/01/2023). Below these, the 'Inventory Required' and 'Supplemental Inventory Required' fields are highlighted with a red box. The 'Inventory Required' field has radio buttons for 'Yes' and 'No'. The 'Supplemental Inventory Required' field also has radio buttons for 'Yes' and 'No'. Below these, there are sections for 'Guardianship Type' (with checkboxes for Person, Estate, General (Plenary), and Limited), 'Annual Report?' (radio buttons for Yes/No), 'Well-Being Report?' (radio buttons for Yes/No), and 'Accounting?' (radio buttons for Yes/No). The 'Accounting?' section includes sub-fields for 'EZ Accounting?', 'SS Representative Payee Report?', and 'Comprehensive Accounting?', each with radio buttons for Yes/No and a 'Frequency (Months)' dropdown menu.

After the enhancement:

The screenshot shows the same 'Judgment' form, but now for a case dated 07/01/2019. The layout is more cohesive, with the reporting fields grouped together. The 'Inventory Required' and 'Supplemental Inventory Required' fields are still highlighted with a red box. The 'Inventory Required' field has radio buttons for 'Yes' and 'No'. The 'Supplemental Inventory Required' field also has radio buttons for 'Yes' and 'No'. Below these, there are sections for 'Guardianship Type' (with checkboxes for Person, Estate, General (Plenary), and Limited), 'Annual Report?' (radio buttons for Yes/No), 'Well-Being Report?' (radio buttons for Yes/No), and 'Accounting?' (radio buttons for Yes/No). The 'Accounting?' section includes sub-fields for 'EZ Accounting?', 'SS Representative Payee Report?', and 'Comprehensive Accounting?', each with radio buttons for Yes/No and a 'Frequency (Months)' dropdown menu.

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# eCourts Guardianship Civil Release Notes 08/04/2023

## Case Management

New

The selection of a reason is now required when a guardian is inactivated. For more information, click [here](#).

## Case Jacket

Enhanced

Maintenance was performed to improve Case Jacket functionality.



## Guardian Inactivation Reason is Required

To support the collection of data about guardianships, the selection of a reason is required when inactivating a guardian.

**Steps** to inactivate a guardian:


- 1) Open a guardian profile in Case Management
- 2) Select 'Inactive' from the 'Party Action' dropdown
- 3) Choose the appropriate reason for inactivation:
  - a. **'Guardian added in error'** – when the wrong guardian is added to a case (i.e., if Helen Dodick is added as guardian instead of the institution Office of the Public Guardian)
  - b. **'Removed for Cause by Court'** – when the Court removed the guardian due to guardian impropriety
  - c. **'Discharged by Court'** – when the Court releases the guardian for reasons other than guardian impropriety (i.e., the guardian has moved away or can no longer act for another reason)
  - d. **'Guardian Died'**
- 4) Click 'Save'
- 5) A success message displays and the guardian status is changed to 'Inactive'

The screenshot shows the 'Guardian Profile' form for 'KITTY KIERNAN' with an appointment date of '09/23/2020' and a status of 'INACTIVE'. The form includes fields for Party Type (Guardian of Person and Estate), First Name (Kitty), Middle name, Last Name (Kiernan), and Appointment Date. The 'Party Action' dropdown is set to 'INACTIVE', and the 'Reason' dropdown is open, showing options: 'Guardian added in error', 'Removed for Cause by Court', 'Discharged by Court', and 'Guardian Died'. Red circles with numbers 1, 2, and 3 are overlaid on the form to indicate the steps: 1 points to the 'Guardian Profile' tab, 2 points to the 'Party Action' dropdown, and 3 points to the 'Reason' dropdown menu.

Manage Case


Updated Guardian successfully **5**

▼ Case Details	County Docket No.: 20-8977	<a href="#">View Case Jacket</a>
County: BURLINGTON	Status: ACTIVE	Date Filed: 08/11/2020
▶ Judgment	09/23/2020	
▶ Estate Value	Initial Estate Value: \$ 23,459	Current Net Estate Value: \$ 23,459
▶ Incapacitated Person (IP) Profile	ELIZABETH EVANS	STATUS: ACTIVE
▶ IP Attorney Profile	PHOEBE CHRISTIAN BENTLEY	STATUS: INACTIVE
▶ Guardian Profile	MARTIN L MORSE	Appointment Date: 09/23/2020 STATUS: ACTIVE
▼ Guardian Profile	KITTY KIERNAN	Appointment Date: 09/23/2020 STATUS: INACTIVE

\* Party Type:  Party Action:  

\* Reason:  Suffix:

\* First Name:  Middle name:  \* Last Name:  Appointment Date:


Alias 

\* New Qualification Required?:  (Noticing will occur based on most recent Judgment Date value.)

\* Is the Guardian an Attorney?:  Yes  No

\* Country:

\* Address Line 1:  Address Line 2:

\* City:  \* State:  \* Zip Code:  

Phone 1:

Phone 2:

Email Address 1:  Email Address 2:

Social Security Number:    Date of Birth:  Relationship to IP:

Gender:

Interpreter Needed?:  Yes  No

Additional Profile Info:

**4**

This functionality is in place for both individual party guardians and for institutional guardians.

**Note:** if the wrong reason is selected, the case can be updated by changing and saving the reason in the guardian profile.

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# eCourts Guardianship Civil Release Notes 06/09/2023

## Upload Document

New

Selection of a guardian is no longer required when uploading the 'Other' document type. For more information, click [here](#).

## Guardian Selection No Longer Required for 'Other' Document Type

In response to user feedback, the guardian dropdown has been removed and selection of a guardian is no longer required for upload of the 'Other' document type.

Select Document Type

\* Document Type: Other

\* Filed Date: 06/06/2023

\* Document Description: Misc Correspondence

Choose File No file chosen

Back Continue

No change has been made to the docket text in Case Jacket:

Filing Date	Filings	Docket Text	Transaction ID	Entry Date	Entered By
06/06/2023		Misc Correspondence	GMP20234698	06/06/2023	susan.flynn



[\(Back\)](#)

# eCourts Guardianship Civil Release

## Notes

### 05/05/2023

#### Upload Document

	A document type for an IP death certificate has been added and will automatically close the guardianship case. For more information, click <a href="#">here</a> .
	An issue with guardian dropdown selections has been corrected. For more information, click <a href="#">here</a> .

## New Document Type for IP Death Certificate

To support accurate case data and streamline user experience, the document type “IP Death Certificate” is now available. Upon upload of the document type, the case is **automatically closed**.

This document type is solely for upload of death certificates for incapacitated persons. The ‘Other’ document type should continue to be used for guardian death certificates.

Additional information:

- All pending report reviews for the case will be automatically closed
- The date of death entered at upload auto-populates the date of death field in the IP profile
- The case can be re-opened via the Case Management tab
- Cases can be created and closed in one session, but Case Initiation Documents remain the required first upload

The screenshot displays the 'Upload Documents' page in the eCOURTS system. The navigation bar includes 'eCOURTS HOME', 'CASE MANAGEMENT', 'UPLOAD DOCUMENT', and 'CASE JACKET'. The page title is 'Upload Documents'. Below the title, there is a 'Back' button and a 'Case Details' section showing 'County Docket No.: 222111' and a 'View Case Jacket' link. A 'Documents Due:' section indicates that there are no documents missing or overdue. The 'Select Document Type' section features a dropdown menu with 'IP Death certificate' selected. A red arrow points to this selection. To the right of the dropdown, there is a 'Date Of Death:' field and a 'Choose File' button with the text 'No file chosen'. At the bottom right of the form, there are 'Back' and 'Continue' buttons.

**Steps:**

- 1) Select 'IP Death Certificate' from the dropdown
- 2) Enter the IP's **date of death** (not the current date unless it is the same)
- 3) Upon upload of the death certificate an informational warning displays
- 4) Click 'Continue' to proceed
- 5) The case is closed

The new document displays in the 'Document Type' dropdown:

Upload Documents

Back

✓ IP Death certificate uploaded successfully  
Upload of IP Death Certificate will close the case.

▼ Case Details County Docket No.: 222111 [View Case Jacket](#)

Documents Due:  
There are no documents missing or overdue at this time.

Select Document Type

✕	* Document Type: IP Death certificate	* Date Of Death: 04/05/2023	IP Death Cert.pdf
---	--	--------------------------------	-------------------

Back Continue

Confirmation

✓ Request processed successfully

▼ Case Details County Docket No.: 222111 [View Case Jacket](#)

County: MIDDLESEX Status: **CLOSED** Date Filed: 06/15/2020

Transaction Information

Documents	Filed Date	Date Submitted	Transaction ID
IP Death certificate	04/05/2023	05/02/2023	GMP20234021



View/Print Find New Case

[\(Back\)](#)

## Dropdown Error Fix

A fix has been deployed to ensure that the guardian dropdown displays the correct choices when the document type "OTSC - Guardian Background Screening" is selected. For this document type **only** "Party Not Appointed" will be a guardian dropdown option.

The screenshot shows the 'eCOURTS HOME' navigation bar with tabs for 'CASE MANAGEMENT', 'UPLOAD DOCUMENT', and 'CASE JACKET'. The main heading is 'Upload Documents' with a 'Back' button. Below this is the 'Case Details' section for 'County Docket No.: CP-5555-2019'. A 'Documents Due:' section lists missing or overdue documents: 'Qualification Documents from Guardian MORSE, MARTIN L' and 'Qualification Documents from Guardian JONES, MOLLY'. The 'Select Document Type' section contains a table with two rows. The first row has 'OTSC-Guardian Background Screening' selected, with a 'Filed Date' of 05/02/2023 and a 'Guardian(s)' dropdown showing 'MOLLY JONES', 'PARTY NOT APPOINTED', and 'MARTIN L MORSE'. The second row has 'Well-Being Report' selected, with a 'Filed Date' of 05/02/2023 and a 'Guardian(s)' dropdown showing 'MOLLY JONES' and 'MARTIN L MORSE'. Red boxes highlight the document type and guardian dropdown fields in both rows.



Select Document Type		
 * Document Type: OTSC-Guardian Background Screening	* Filed Date: 05/02/2023	* Guardian(s): MOLLY JONES PARTY NOT APPOINTED MARTIN L MORSE
 * Document Type: Well-Being Report	* Filed Date: 05/02/2023	* Guardian(s): MOLLY JONES MARTIN L MORSE

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# eCourts Guardianship Civil Release Notes 04/06/2023

## Upload Document

	A new document type for uploading administrative records is now available to support the guardian background screening policy. For more information, click <a href="#">here</a> .
	An incorrect error message in the guardian profile during case creation no longer displays. For more information, click <a href="#">here</a> .

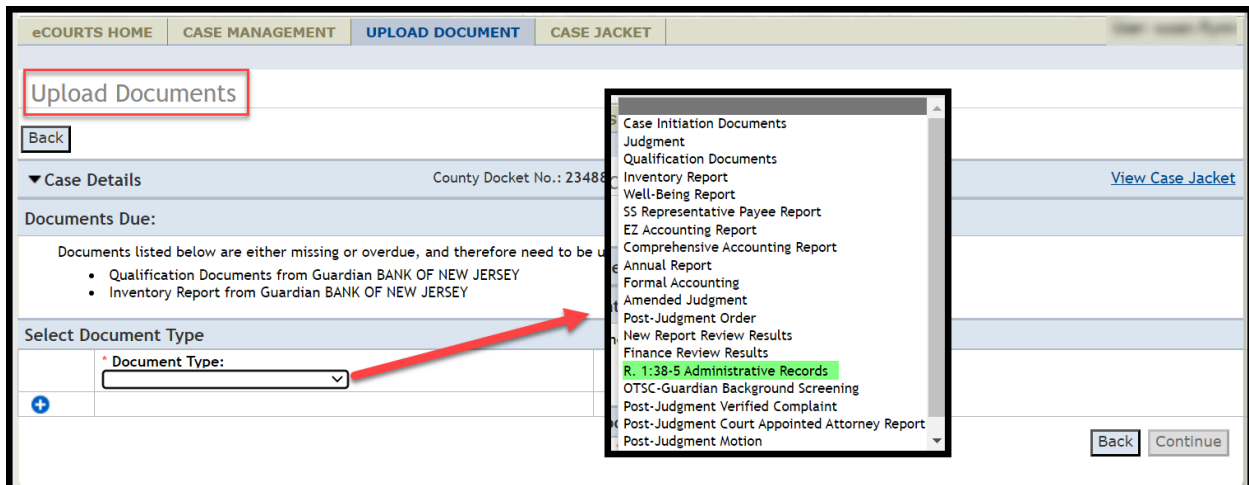
## New Document Type for Administrative Records

To support the guardian background screening policy, the document type “R. 1:38-5 Administrative Records” is now available for the upload of sensitive and confidential documents such as:

- Checklist for Surrogate or Judge’s Staff: Background Screening Policy for Proposed Guardians of Incapacitated Adults
- Proposed Guardian Background Screening and Authorization Checklist
- Certification of Criminal and Civil Judgment History
- New Jersey Background Screening Policy for Proposed Guardians of Incapacitated Adults Acknowledgment Form
- Other documents relating to the background screening policy

Contact your Program Coordinator with any questions concerning this document type.

The new document displays in the ‘Document Type’ dropdown:



**Steps:**

- 1) Select R. 1:38-5 Administrative Records from the dropdown
- 2) Enter a description of up to seventy-five (75) characters
- 3) Upload the PDF containing the records
- 4) Click 'Continue'

In the Case Jacket, the records display with the description entered during upload:

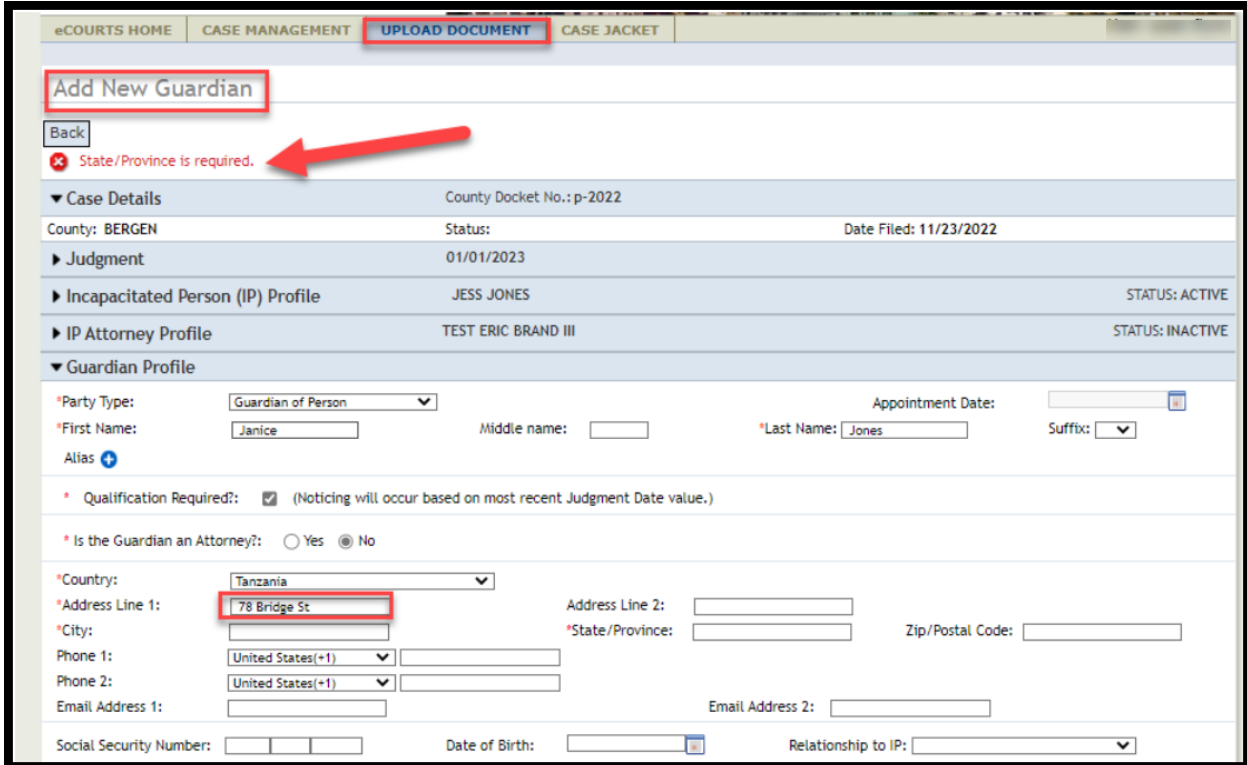
Filing Date	Filings	Docket Text	Transaction ID	Entry Date	Entered By
04/05/2023		R. 1:38-5 Administrative Records-Background screening checklists and certifications - Gdn Perri Garfield	GMP20233942	04/05/2023	susan.flynn

[\(Back\)](#)

## Error Message Fix

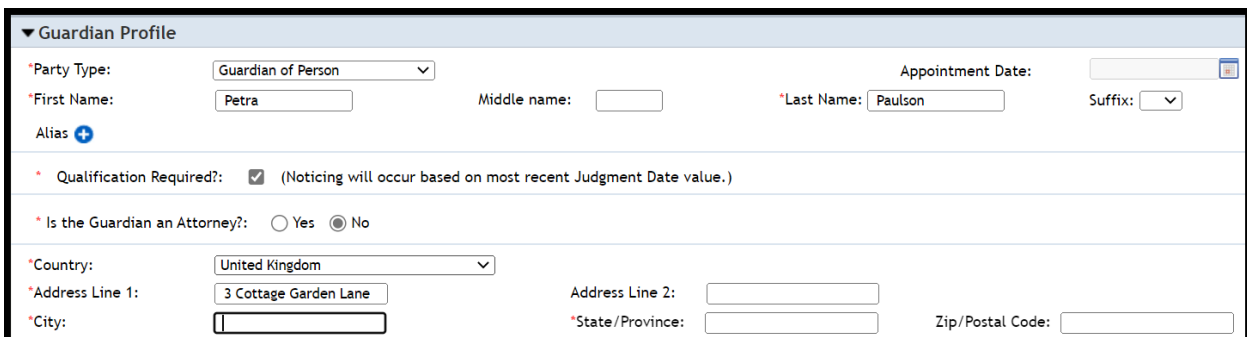
A fix has deployed to remove the premature display of an error message in the guardian profile during Case Creation. Prior to the fix, when adding a guardian with a foreign address an error message immediately displayed upon completion of the 'Address Line 1' field. Now the error message will display only when warranted.

### Prior to the fix:



The screenshot shows the 'Add New Guardian' form in the eCOURTS system. The form is titled 'Add New Guardian' and has a 'Back' button. A red box highlights the title, and a red arrow points to an error message: 'State/Province is required.' The form includes sections for Case Details, Incapacitated Person (IP) Profile, IP Attorney Profile, and Guardian Profile. The Guardian Profile section is expanded, showing fields for Party Type (Guardian of Person), Appointment Date, First Name (Janice), Middle name, Last Name (Jones), Suffix, Qualification Required? (checked), Is the Guardian an Attorney? (No), Country (Tanzania), Address Line 1 (78 Bridge St), Address Line 2, City, State/Province, Zip/Postal Code, Phone 1, Phone 2, Email Address 1, Email Address 2, Social Security Number, Date of Birth, and Relationship to IP.

### After the fix:



The screenshot shows the 'Guardian Profile' form after the fix. The form is titled 'Guardian Profile' and has a 'Back' button. The form includes sections for Party Type, Appointment Date, First Name, Middle name, Last Name, Suffix, Qualification Required? (checked), Is the Guardian an Attorney? (No), Country (United Kingdom), Address Line 1 (3 Cottage Garden Lane), Address Line 2, City, State/Province, Zip/Postal Code, Phone 1, Phone 2, Email Address 1, Email Address 2, Social Security Number, Date of Birth, and Relationship to IP.

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# eCourts Guardianship Civil Release

## Notes

### 03/10/2023

#### Foreign Address Fields in Guardian Profile

<b>New</b>	Foreign address fields have been added to individual party guardian profiles. For more information, click <a href="#">here</a> .
<b>New</b>	Notices can now be sent to guardians with foreign addresses. For more information, click <a href="#">here</a> .

#### Comment Text Boxes Expanded in Report Review

<b>New</b>	The Report Review comment text boxes have been expanded to accommodate additional text. For more information, click <a href="#">here</a> .
<b>Fixed</b>	The Report Review workflow bug where the 'Close' button displayed instead of 'Submit' has been fixed. For more information, click <a href="#">here</a> .
<b>Fixed</b>	A fix has been entered to prevent the truncation of the Report Review PDF summaries in the Case Jacket. For more information, click <a href="#">here</a> .

## Foreign Address Fields in Guardian Profiles

Foreign address fields have been added to all individual party guardian profiles and are available in the **Upload Document** tab during case creation and the **Case Management** tab for updating existing cases.

Alphabetically ordered dropdowns display in the 'Country', 'Phone 1' and 'Phone 2' fields for selection of the appropriate country.

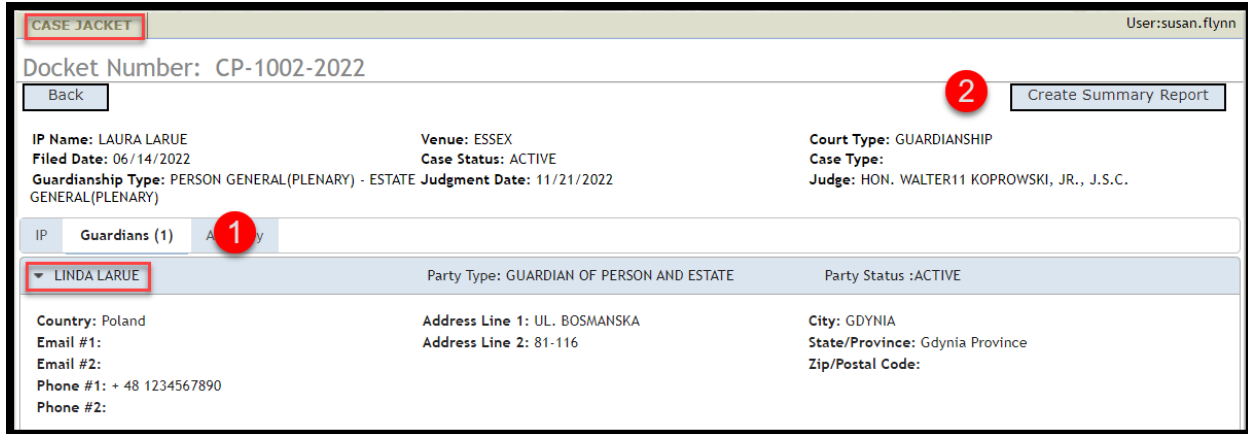
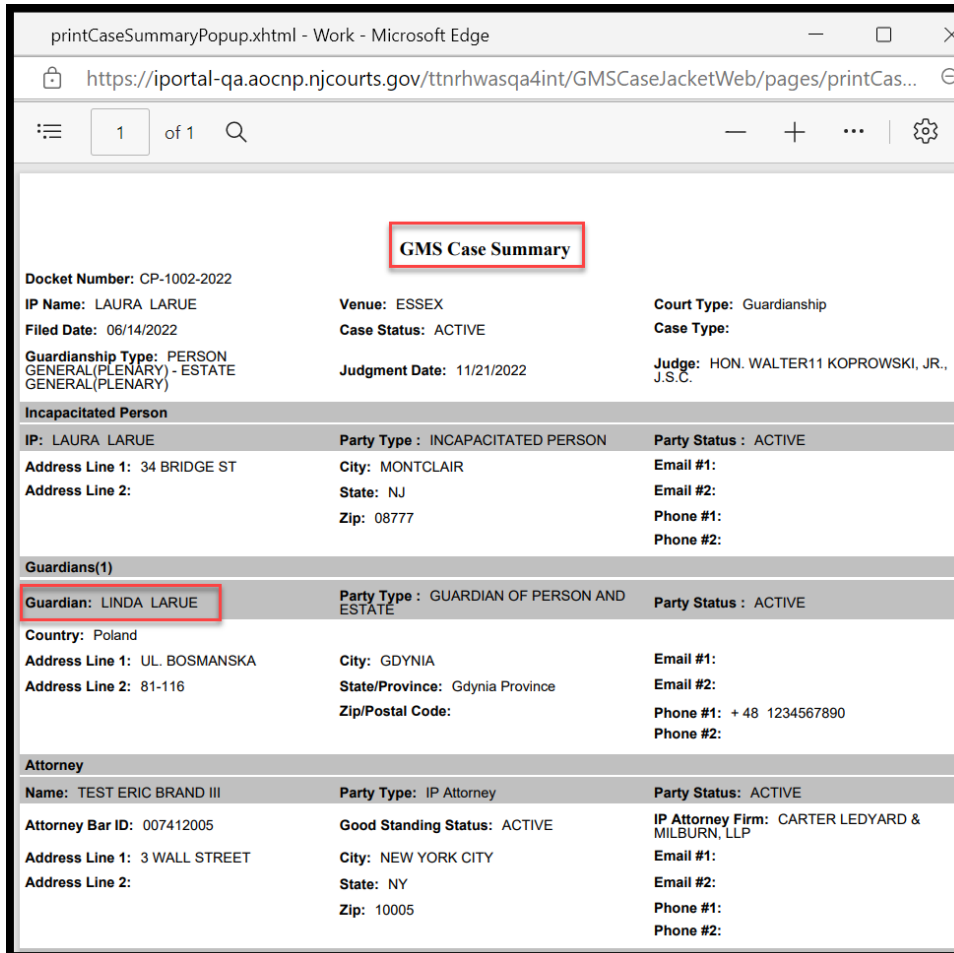
The screenshot shows the 'Add New Guardian' form in the eCOURTS system. The form is for 'Laura Larue' and 'Test Eric Brand III'. The 'Guardian Profile' section is expanded, showing fields for Party Type, Name, Address, Phone, and Email. A dropdown menu for 'Country' is open, showing a list of countries including Switzerland, Syria, Taiwan, Tajikistan, Tanzania, Thailand, Togo, Tokelau Islands, Tonga, Trinidad / Tobago, Tunisia, Turkey, Turkmenistan, Turks and Caicos Islands, Tuvalu, Uganda, Ukraine, United Arab Emirates, United Kingdom, and United States. The 'Country' field is highlighted with a red box. Other fields like 'Phone 1' and 'Phone 2' are also highlighted with red boxes.

'State/Province' is a required field, and 'Zip/Postal Code' becomes optional:

The screenshot shows the 'Guardian Profile' form in the eCOURTS system. The form is for 'Linda' and 'LaRue'. The 'Guardian Profile' section is expanded, showing fields for Party Type, Name, Address, Phone, and Email. The 'Country' field is set to 'Poland'. The 'State/Province' field is set to 'Gdynia Province' and the 'Zip/Postal Code' field is set to '81-116'. The 'State/Province' and 'Zip/Postal Code' fields are highlighted with red boxes.

The foreign address fields display in Case Jacket in the:

- 1) **Guardians** tab
- 2) Summary Report

[\(Back\)](#)

## Notices

With the addition of the new fields, notices can now be sent to guardians with foreign addresses.

00018 Hon. Sherri L. Schweitzer, P.J.Ch. Superior Court of New Jersey Camden County Hall of Justice 101 South 5th Street, 6th Floor Camden, NJ 08103-4001		
<table border="1"><tr><td>THEDA BARA ANY ST ANYVILLE COTSWOLDS, UNITED KINGDOM 9887766</td></tr></table>	THEDA BARA ANY ST ANYVILLE COTSWOLDS, UNITED KINGDOM 9887766	
THEDA BARA ANY ST ANYVILLE COTSWOLDS, UNITED KINGDOM 9887766		
	February 22, 2023	
<b>NOTICE: NEED TO FILE GUARDIANSHIP REPORT(S)</b> Re: Docket Number cp-1001-2022		

**Note:** Existing cases must be manually updated if they contain addresses that were unable to be accommodated prior to the addition of the foreign address fields.

[\(Back\)](#)



## Comment Text Boxes in Report Review

In response to user feedback, the comment text boxes in Report Review have been expanded to accommodate more characters.

### Review work area:

Answer all questions below based on comparison to the Inventory or the prior year's reporting.

1. Is the reporting period correct?

Emergent?

Issues

Reporting period incorre... X Clear

Comment/Explanation

Comment/Explanation

Remaining: 500 characters

### Draft Notes:

Add Draft Note X

Remaining: 500 characters

Cancel Add

### Review Return to Finance:

Send to Finance

Reason \*

Select Reset

Comments \*

Remaining: 500 characters

[\(Back\)](#)

## Report Review Workflow Fix

The Report Review workflow has been restored. At the completion of a review, users will see the 'Submit' button and be able to complete the review in one continuous workflow. Prior to the fix, users were required to click 'Close' after completing a review, re-open the review from a draft status on the workbasket, and then click 'Submit' to complete the review.

The workflow has been restored such that the review steps are:

- 1) Answer each question
- 2) Click 'Next' to advance the screen
- 3) Examine the read-only review
- 4) Click 'Submit' to complete the review OR click 'Back' to change a response

**Finance Review** [New Report Review](#)

**Finance Review**

Answer all questions below based on comparison to the Certification of Assets. **1**

1. Is the reporting period correct?  Yes  No
2. Is the correct reporting form used?  Yes  No
3. Does the report contain all required information?  Yes  No
4. Is the information reported consistent with the income/assets/liabilities/encumbrances reported in the Certification of Assets?  Yes  No
5. Do the liabilities/encumbrances match the IP's condition and residential arrangement?  Yes  No
6. Based on the current estate value, is the bond amount appropriate?  Yes  No
7. Based on the current estate value and the guardian's relationship with the IP, are the guardian reporting requirements appropriate?  Yes  No
8. Based on this report, should the guardian's appointment be reviewed?  Yes  No
9. Are there other areas of concern?  Yes  No
10. Are there mathematical errors in the report?  Yes  No
11. Net Estate Value (NEV) for this report

**2**

Finance Review

Please review and confirm responses below before final submission.

3

- |  |     |
|--|-----|
| 1. Is the reporting period correct?  | Yes |
| 2. Is the correct reporting form used?   | Yes |
| 3. Does the report contain all required information?   | Yes |
| 4. Is the information reported consistent with the income/assets/liabilities/encumbrances reported in the Certification of Assets?     | Yes |
| 5. Do the liabilities/encumbrances match the IP's condition and residential arrangement?   | Yes |
| 6. Based on the current estate value, is the bond amount appropriate?  | Yes |
| 7. Based on the current estate value and the guardian's relationship with the IP, are the guardian reporting requirements appropriate? | Yes |
| 8. Based on this report, should the guardian's appointment be reviewed?  | No  |
| 9. Are there other areas of concern?   | No  |
| 10. Are there mathematical errors in the report?   | No  |
| 11. Net Estate Value (NEV) for this report   | \$0 |

Certification of Information

I certify that this report has been reviewed by me and acknowledge that there are no issues identified.

4

Back Submit

[\(Back\)](#)

## Report Review PDF Summary Fix

A fix has been entered to prevent the truncation of the Report Review summaries in the Case Jacket. Prior to the fix, the top line of text was cut off.

### Prior to the fix:

	YES	NO
Issues		
Tax returns		
Beginning cash balance does not match ending balance of prior report		
Tax payments		
Other		
Comment/Explanation		
The Qualifications Required checkbox now also clears automatically after an overdue notice has been sent. For more information, click here. The Qualifications Required checkbox now also clears		
<p><b>CONFIDENTIAL QA (CAM) CP-1001-2022 02/24/2023 11:03:33 AM Pg 6 of 6 Trans ID: GMP20231856</b></p>		
Guardian has not identified, traced or collected all of the IP's assets		For more information, click here. The Qualifications Required checkbox now also clears automatically after an overdue notice has been sent. For more information, click here. The Qualifications Required checkbox now also clears automatically after an overdue
Follow-Up Actions		
Update case information or status		



### After the fix:

Judge Review Summary		
Submitted by: susan.flynn on 03/09/2023 12:18:56 PM		
Is the correct reporting form used?		Response
		No
		Emergent
		No
Issues	Comment/Explanation	
Wrong form used	test comments	
Follow-Up Actions	Follow-Up Status	
Update case information or status	Open	
Letter to Guardian(s) seeking information	Open	
<p><b>CONFIDENTIAL QA (BUR) 2022-121 03/09/2023 12:18:58 PM Pg 2 of 2 Trans ID: GMP20232325</b></p>		
Does the report contain all required information?		Response
		No
		Emergent
		No
Issues	Comment/Explanation	
Incomplete	testing comments	
Follow-Up Actions	Follow-Up Status	
Review for significant financial concerns (Judge)	Open	
Schedule conference with guardian(s)	Open	
Letter to Guardian(s) seeking information	Open	

[\(Back\)](#)

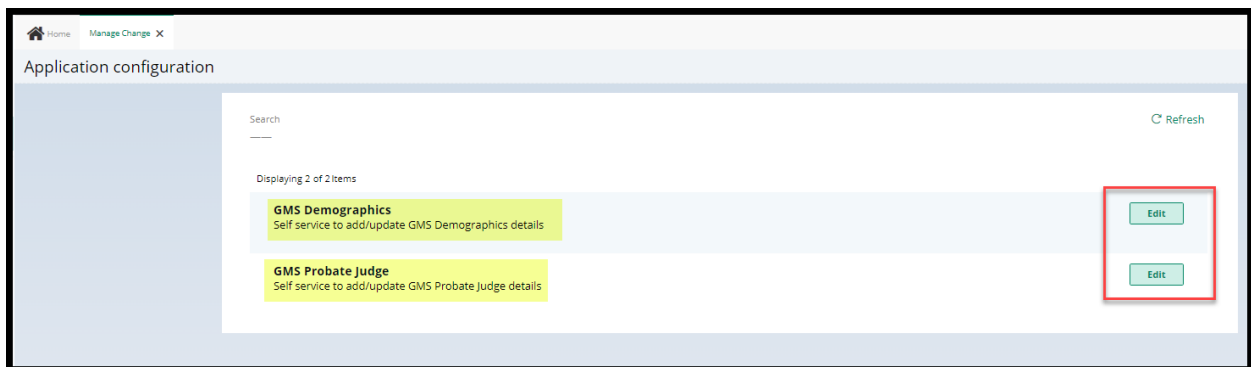
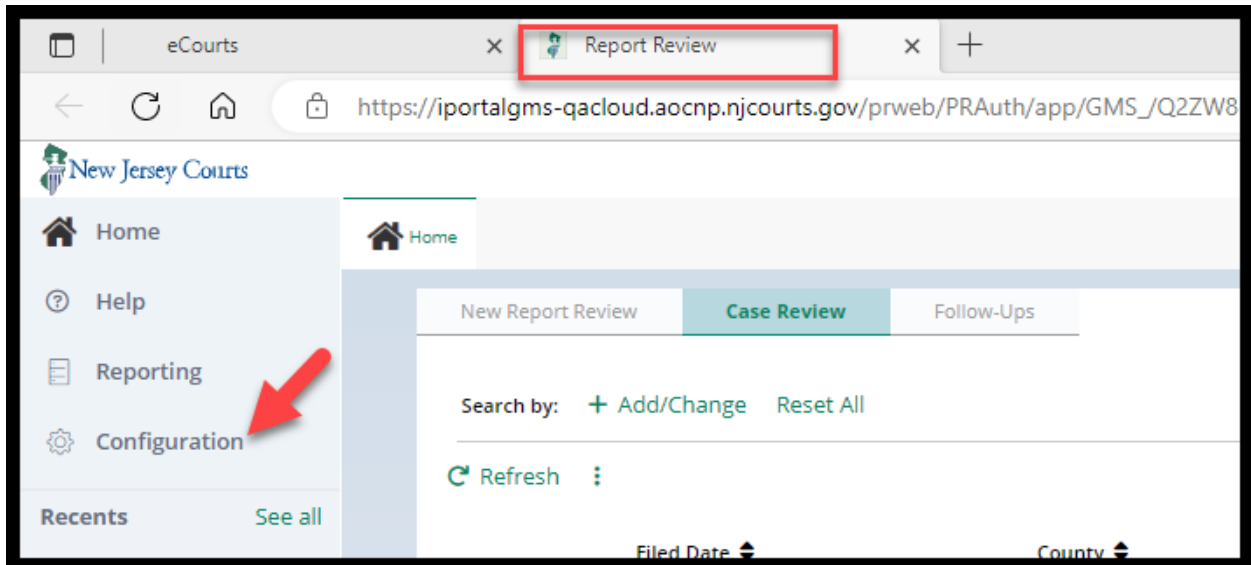
# eCourts Guardianship – Report Review Civil Release Notes 12/16/2022

## Self-Service Maintenance Tables

	A self-service maintenance table containing the judge and surrogate contact information used in noticing has been added to Report Review. For more information, click <a href="#">here</a> .
	A self-service maintenance table for probate judges has been added to Report Review. For more information, click <a href="#">here</a> .

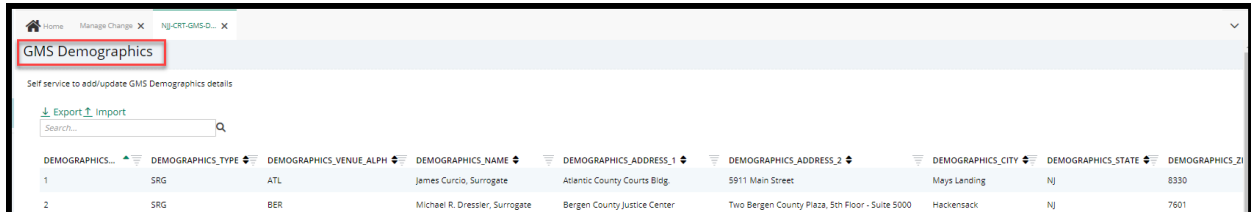
## Self-Service Tables

Two self-service tables have been deployed to Report Review. ATCSU users can access the tables via the 'Configuration' link on the left navigation panel. Exposing the tables to ATCSU users will streamline the process for making updates to the: 1) contact information contained in overdue notices; and 2) judge dropdown in Case Management.



## Demographics Table for Notice Contact Information

The 'GMS Demographics' table contains the contact information for the judges and surrogates included on the overdue notices. ATCSU will be able to make updates and additions via the table that will update the database in real time.



Self service to add/update GMS Demographics details

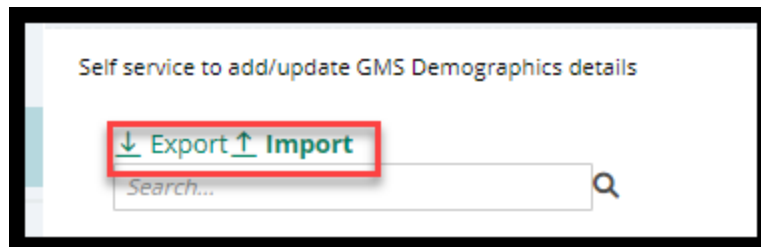
↓ Export ↑ Import

Search...

DEMOGRAPHICS...	DEMOGRAPHICS_TYPE	DEMOGRAPHICS_VENUE_ALPHA	DEMOGRAPHICS_NAME	DEMOGRAPHICS_ADDRESS_1	DEMOGRAPHICS_ADDRESS_2	DEMOGRAPHICS_CITY	DEMOGRAPHICS_STATE	DEMOGRAPHICS_ZI
1	SRG	ATL	James Curcio, Surrogate	Atlantic County Courts Bldg	5911 Main Street	Mays Landing	NJ	8330
2	SRG	BER	Michael R. Dressler, Surrogate	Bergen County Justice Center	Two Bergen County Plaza, 5th Floor - Suite 5000	Hackensack	NJ	7601



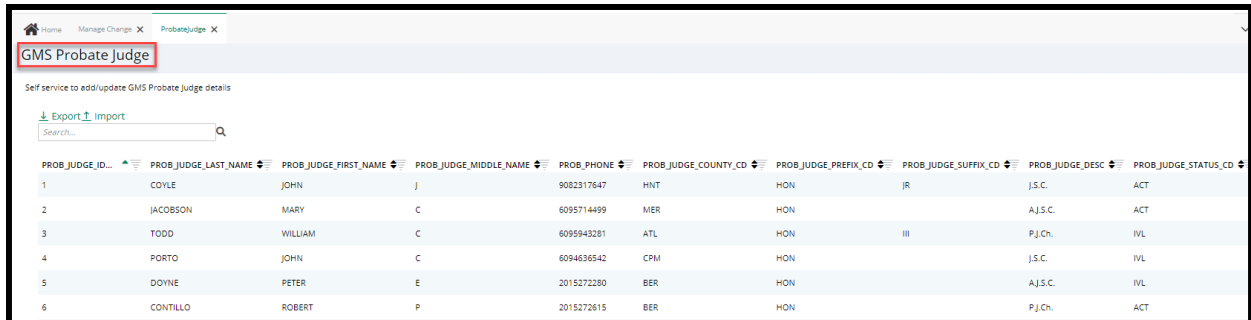
The table can be exported as a csv file. Updates and additions can also be performed by importing a csv file.



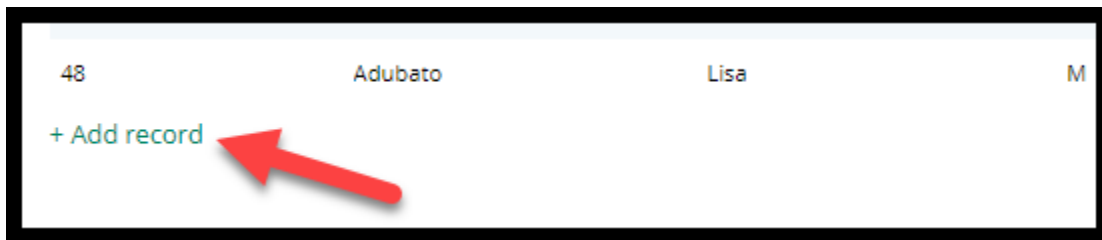
([Back](#))

## Probate Judge Table

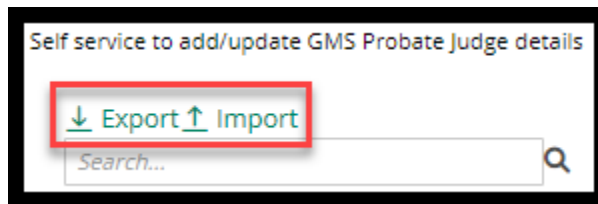
The Probate Judge maintenance table contains the list of the judges in the dropdown list in Case Management. Updates made to the table will be reflected in the judge dropdown in real time.



PROB_JUDGE_ID...	PROB_JUDGE_LAST_NAME	PROB_JUDGE_FIRST_NAME	PROB_JUDGE_MIDDLE_NAME	PROB_PHONE	PROB_JUDGE_COUNTY_CD	PROB_JUDGE_PREFIX_CD	PROB_JUDGE_SUFFIX_CD	PROB_JUDGE_DESC	PROB_JUDGE_STATUS_CD
1	COYLE	JOHN	J	9082317647	HINT	HON	JR	J.S.C.	ACT
2	JACOBSON	MARY	C	6095714499	MER	HON		A.J.S.C.	ACT
3	TODD	WILLIAM	C	6095943281	ATL	HON	III	P.J.Ch.	IVL
4	PORTO	JOHN	C	6094636542	CPM	HON		J.S.C.	IVL
5	DOYNE	PETER	E	2015272280	BER	HON		A.J.S.C.	IVL
6	CONTILLO	ROBERT	P	2015272615	BER	HON		P.J.Ch.	ACT



The table can be exported as a csv file. Updates and additions can also be performed by importing a csv file.





Updates to the table reflect in the 'Judgment' section of Case Management:

**Judgment** 07/21/2021

\* Initial Judgment Date: 07/21/2021 \* Verified Complaint Filed Date: 05/05/2021

\* Inventory Required:  Yes  No

\* Guardianship Type:  Person  General (Plenary) OR  Limited  
 Estate  General (Plenary) OR  Limited

\* Annual Report?:  Yes  No *Primarily used for backloading.*

\* Well-Being Report?:  Yes  No Frequency (Months): 12

\* Accounting?:  Yes  No  
\* EZ Accounting?:  Yes  No  
\* SS Representative Payee Report?:  Yes  No  
\* Comprehensive Accounting?:  Yes  No Frequency (Months): 12

\* Bond Required?: \$: 100,000 Date of Bond: 07/21/2021

\* Amended Bond?: \$: 25,000 Date of Bond: 05/18/2022

\* Guardian(s) Limitations?:  
[Click to select multiple entries](#)  
Estate may not alienate, mortgage, transfer or otherwise encumber or dispose of real property without court approval, may sell any interest in real property owned by IP.  
An(s) of Person with respect to medical decisions that require informed consent of the property is limited to \_\_\_\_\_.

\* Firearms Rights Retained?: 0

\* Other Rights Retained?:


\* Judge Name: GEIGER, RICHARD J (Select the most recent judge to issue an order in this case.)

Judgment Comments:

[\(Back\)](#)

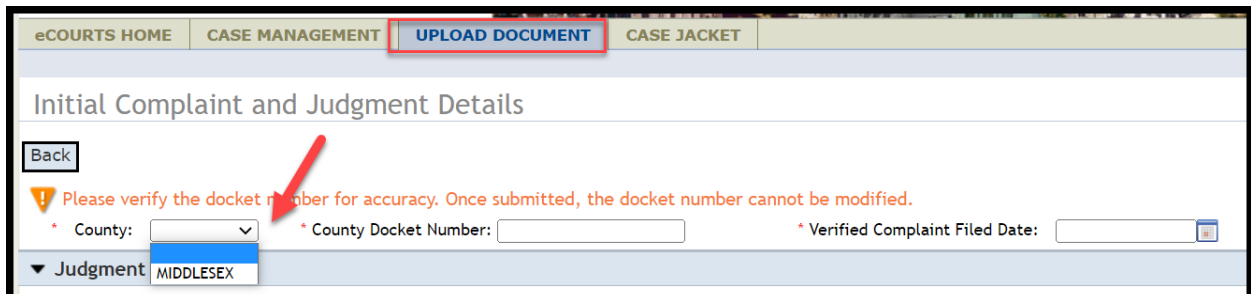
# eCourts Guardianship – Civil Release Notes 10/19/2022

## eCourts Upload Document

	Users with single county access can now select their county from the dropdown to complete case creation. For more information, click <a href="#">here</a> .
---	---

## County Dropdown Selection Fixed for Users with Single County Access

A fix has been deployed such that users with single county access will see the 'County' field on the 'Initial Complaint and Judgment Details' screen and select their county from the dropdown. Once the county is selected users will complete the remaining fields and complete case creation as usual.



[\(Back\)](#)

# eCourts Guardianship – Civil Release

## Notes

### 10/14/2022

#### eCourts Upload Document

Enhanced	The upload size for external users has been increased to 35MB. For more information, click <a href="#">here</a> .
Enhanced	The document type “Subsequent Order” has been renamed “Post-Judgment Order” to align with other post judgment document types. For more information, click <a href="#">here</a> .
Enhanced	An error message has been updated in instances where ‘Submit’ is clicked more than once. For more information, click <a href="#">here</a> .
Enhanced	A tool tip has been added to support correct responses to the firearms rights retention question. For more information, click <a href="#">here</a> .
Fixed	The county dropdown now defaults to blank for users with multi-county access. For more information, click <a href="#">here</a> .

#### User Interface Fixes

Fixed	Multiple user interface display issues have been fixed to enhance user experience and ensure consistency across applications. For more information, click <a href="#">here</a> .
-------	--

## Upload Size Increase for External Users

An enhancement has been implemented to increase the upload size for external users from 7MB to 35MB. This enhancement will improve user experience by minimizing the need to make multiple uploads for a large or complex documents.

eCOURTS HOME CASE MANAGEMENT **UPLOAD DOCUMENT** CASE JACKET User: gmstest5

### Upload Documents

[Back](#)

▼ Case Details County Docket No.: WRN1 [View Case Jacket](#)

**Documents Due:**

Documents listed below are either missing or overdue, and therefore need to be uploaded.

- Qualification Documents from Guardian CHASE BANK
- Qualification Documents from Guardian INSTITUTE FOR BEHAV. HEALTH & DEVEL. DISABIL.
- Inventory Report from Guardian PARKER, PETER
- Inventory Report from Guardian MORSE, MARTIN L
- Inventory Report from Guardian CHASE BANK
- Inventory Report from Guardian INSTITUTE FOR BEHAV. HEALTH & DEVEL. DISABIL.

**Select Document Type**

	Document Type: <input type="text"/>					<input type="button" value="Choose File"/> No file chosen
<input type="button" value="+"/>						

[Back](#) [Continue](#)

Increased to 35MB

[\(Back\)](#)

## Document Type Label Updated

The document type “Subsequent Order” has been re-labeled to “Post-Judgment Order” to align with other post judgment pleading document types.

**Select Document Type**

\* Document Type: Case Initiation Documents

\* Document Type: Judgment

\* Document Type:

Case Initiation Documents  
Judgment  
Qualification Documents  
Inventory Report  
Well-Being Report  
SS Representative Payee Report  
EZ Accounting Report  
Comprehensive Accounting Report  
Annual Report  
Formal Accounting  
Amended Judgment  
**Post-Judgment Order**  
New Report Review Results  
Finance Review Results  
OTSC-Guardian Background Screening  
Post-Judgment Verified Complaint  
Post-Judgment Court Appointed Attorney Report  
Post-Judgment Motion  
Other

\* Filed Date: 09/01/2022

\* Net Estate Value: 35,000

Case Initiation Documents.pdf  
Judgment.pdf

Choose File No file chosen

Back Continue

The required fields remain the same:

\* Document Type: Post-Judgment Order

\* Filed Date: 10/06/2022

\* Judge Name: JACOBSON, MARY C

Subsequent Order.pdf

Case Jacket example:

**CASE JACKET** User:susan.flynn

Docket Number: OCN44489

Back Create Summary Report

IP Name: ORLANDO ORTIZ Venue: OCEAN Court Type: GUARDIANSHIP  
Filed Date: 11/02/2021 Case Status: ACTIVE Case Type:  
Guardianship Type: PERSON GENERAL(PLENARY) - ESTATE Judgment Date: 12/08/2021 Judge: HON. REPORT JUDGE, SR.

IP Guardians (1) Attorney

ORLANDO ORTIZ Party Type: INCAPACITATED PERSON Party Status :ACTIVE

Case Actions Search: post

Filing Date	Filings	Docket Text	Transaction ID	Entry Date	Entered By
04/06/2022		Post-Judgment Verified Complaint	GMP20223390	09/21/2022	susan.flynn
05/25/2022		Post-Judgment Court Appointed Attorney Report	GMP20223391	09/21/2022	susan.flynn
09/12/2022		Post-Judgment Motion	GMP20223392	09/21/2022	susan.flynn
10/11/2022		Post-Judgment Order	GMP20223490	10/11/2022	susan.flynn

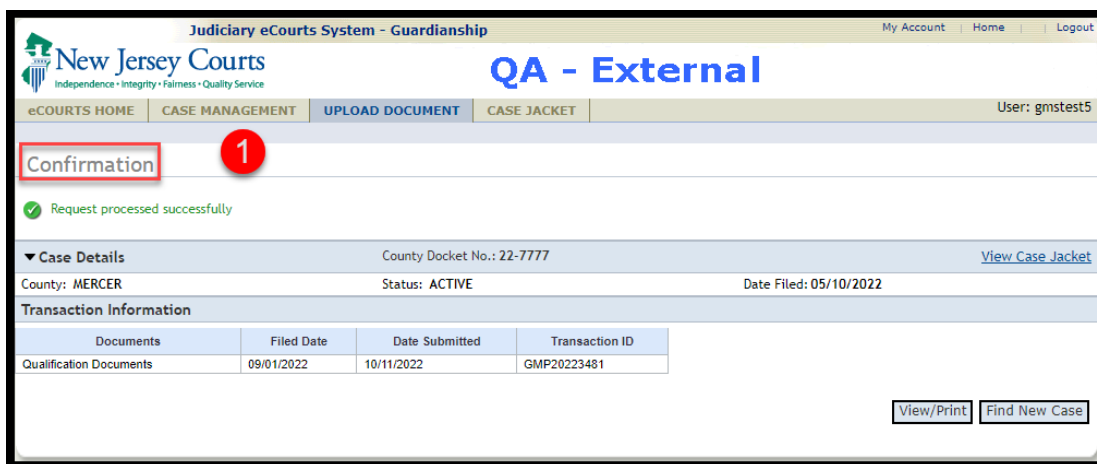
(Back)

## Error Message Update

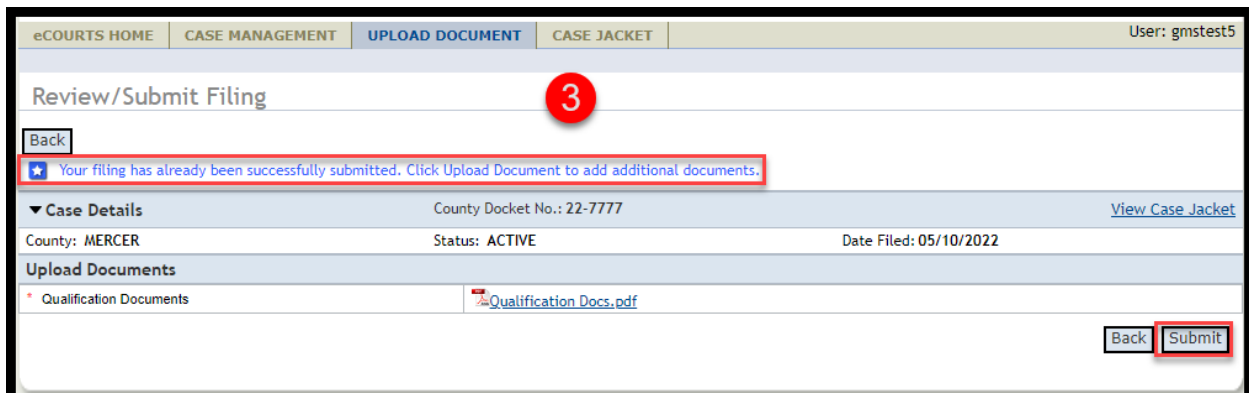
The error message that displays when 'Submit' is clicked multiple times for the same document has been revised to provide accurate information for users.

### Steps:

- 1) User uploads a document and receives the 'Confirmation' screen
- 2) Browser back or refresh buttons are clicked
- 3) 'Submit' is clicked on the 'Review/Submit Filing' screen



2



(Back)

## Firearms Rights Tool Tip

A tool tip has been added to the 'Firearms Rights Retained?' question. The purpose of this tool tip is to ensure accurate data capture so that all appropriate cases are transmitted to the National Instant Criminal Background Check System (NICS).

The tool tip displays at Case Creation and in Case Management.

### Case Creation:

The screenshot shows the 'Judgment' section of a case creation form. It includes fields for 'Initial Judgment Date' (09/01/2022), 'Guardianship Type' (Person selected), 'Inventory Required' (Yes selected), 'Annual Report?' (No selected), 'Well-Being Report?' (Yes selected), 'Accounting?' (Yes selected), 'Bond Required?' (Yes selected), and 'Guardian(s) Limitations?' (Yes selected). A tooltip is visible over the 'Firearms Rights Retained?' field, which is highlighted in yellow. The tooltip text reads: 'Check Judgment before selecting Yes.' A red arrow points from the tooltip to the 'Firearms Rights Retained?' field.

### Case Management:

The screenshot shows the 'Case Management' view of the form. The 'Firearms Rights Retained?' field is highlighted with a red box. A tooltip is visible over the field, reading: 'Check Judgment before selecting Yes.' The 'Guardian(s) Limitations?' field is also visible, with a tooltip that reads: 'Click Ctrl + Left Click Guardian(s) of Estate The OPG, with court Limited Guardian(s) of Guardianship of the p OTHER'.

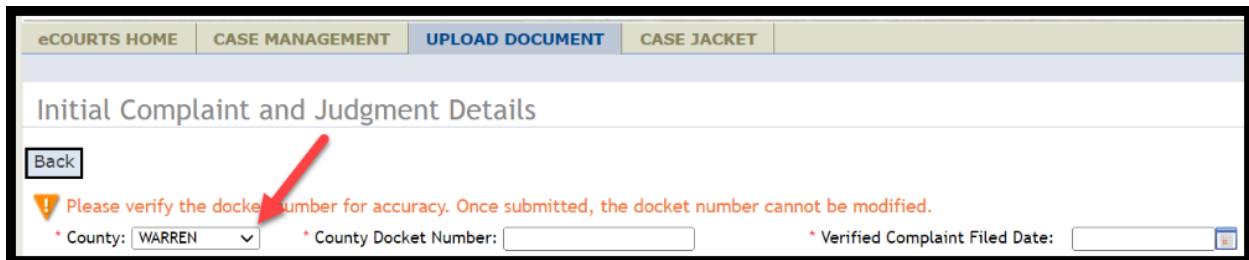
[\(Back\)](#)

## County Dropdown Selection Required for Users with Multi-County Access

In Case Creation, all users with multi-county access are now required to select the appropriate venue for the case because the system will default to a blank in the 'County' field. Users will not be able to proceed until a county is selected.

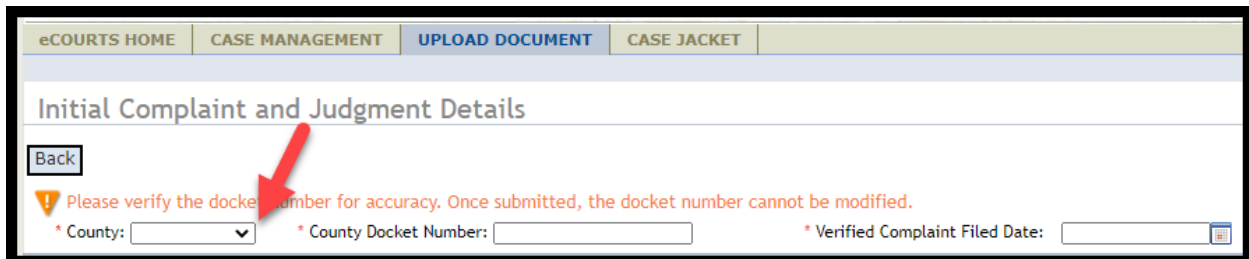
This fix will promote more accurate data entry.

### Prior to the fix:



The screenshot shows the 'Initial Complaint and Judgment Details' page. At the top, there are navigation tabs: 'eCOURTS HOME', 'CASE MANAGEMENT', 'UPLOAD DOCUMENT', and 'CASE JACKET'. Below the title, there is a 'Back' button. A warning message reads: 'Please verify the docket number for accuracy. Once submitted, the docket number cannot be modified.' Below this, there are three input fields: '\* County:' with a dropdown menu showing 'WARREN', '\* County Docket Number:' with an empty text box, and '\* Verified Complaint Filed Date:' with an empty date picker. A red arrow points to the dropdown arrow of the 'County' field.

### After the fix:



The screenshot shows the same 'Initial Complaint and Judgment Details' page. The 'County' dropdown menu is now empty. A red arrow points to the dropdown arrow of the 'County' field.

**Note:** Users with single county access will not be impacted by this enhancement.

[\(Back\)](#)

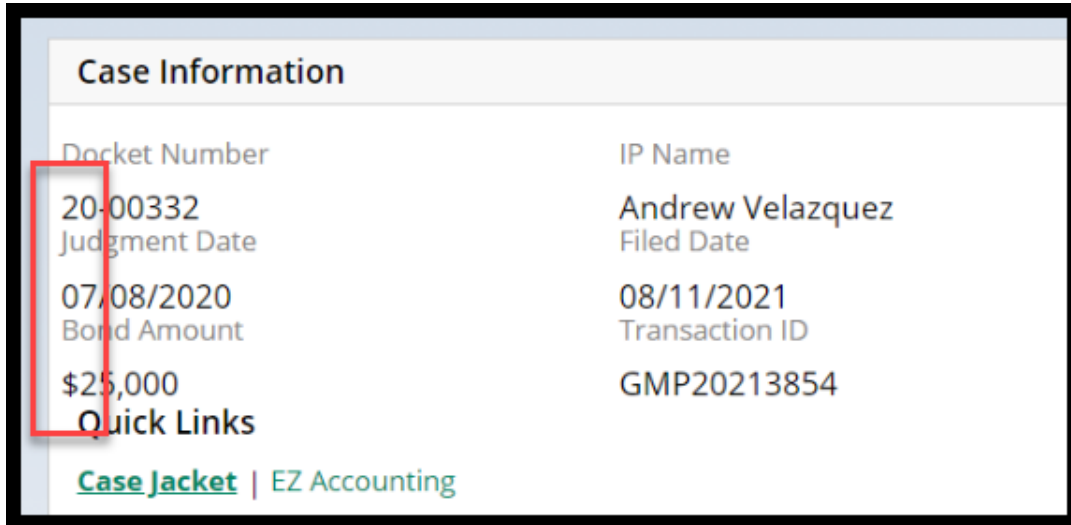


## User Interface Fixes

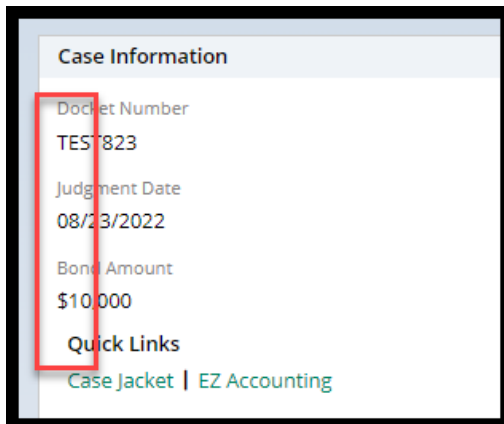
Several user interface display fixes have been deployed to Report Review and Case Jacket to enhance user experience and ensure consistency across applications.

### Report Review Case Information container

Prior to the fix:



After the fix:



## Report Review work area

Prior to the fix:

5. Do the liabilities/encumbrances match the IP's condition and residential arrangement?

Emergent?

Issues

Schedule F: Encumbrances X v Clear

Follow Ups

Letter to Guardian(s) see... X Provide information or a... X v Clear

No Follow Up Needed

After the fix:

5. Do the disbursements match the IP's condition and residential arrangement?

Emergent?

Issues

Summary - Schedule B-4... X v Clear

**Please confirm or update selections here**

Follow Ups

Letter to Guardian(s) see... X Schedule conference wit... X v Clear

No Follow Up Needed

## Report Review Submission Confirmation

Prior to the fix:

**Review Submitted.**

Case Information

Docket Number  
CP-9877-2021

Judgment Date  
08/04/2021

Bond Amount  
\$5,000

After the fix:

**Review Submitted.**

**Case Information**

Docket Number  
TEST823

Judgment Date  
08/23/2022

Bond Amount  
\$10,000

### Case Jacket Review Summaries

Prior to the fix:

CONFIDENTIAL (BER) P-050-20 09/20/2022 04:07:59 PM Pg 2 of 2 Trans ID: GMP202287751

**Do the income and disbursements appear accurate and consistent with the judgment, other orders, and any prior reports?**

	Response	Emergent
	No	No

Issues: Summary – Schedule B-4: All Other Disbursements

Comment/Explanation: no disbursements noted

Follow-Up Status: Open

---

**Are there mathematical errors in the report?**

	Response	Emergent
	Yes	No

Issues: Summary - Schedule B-EZ: Disbursements

Comment/Explanation: no disbursements or ending balance noted

Follow-Up Status: Open

Letter to Guardian(s) seeking information

After the fix:

CONFIDENTIAL QA (MER) MER2017-126 10/11/2022 03:54:16 PM Pg 2 of 3 Trans ID: GMP20223503

**Does the report contain all required information?**

	Response	Emergent
	No	No

Issues: Incomplete

Comment/Explanation: test

Follow-Up Status: Open


Update case information or status

Letter to Guardian(s) seeking information


[\(Back\)](#)

# eCourts Guardianship – Civil Release Notes 09/23/2022


## eCourts Case Management

	When an Annual Report is required, the system will now prohibit users from also selecting the other report types. For more information, click <a href="#">here</a> .
---	--

## eCourts Upload Document

	Three new document types have been added to the 'Documents' dropdown menu to support the upload of post-judgment pleadings. For more information, click <a href="#">here</a> .
---	--

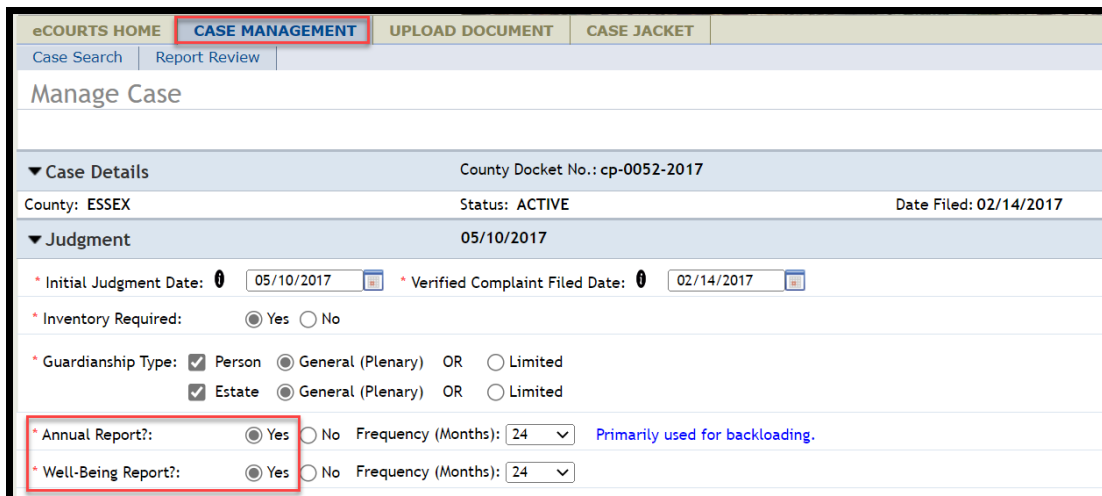
## Report Review

	A fix has been deployed to Report Review to capture multiple updates to the Bond and Amended Bond fields made in Case Management. For more information, click <a href="#">here</a> .
---	--

## Case Management Enhancement

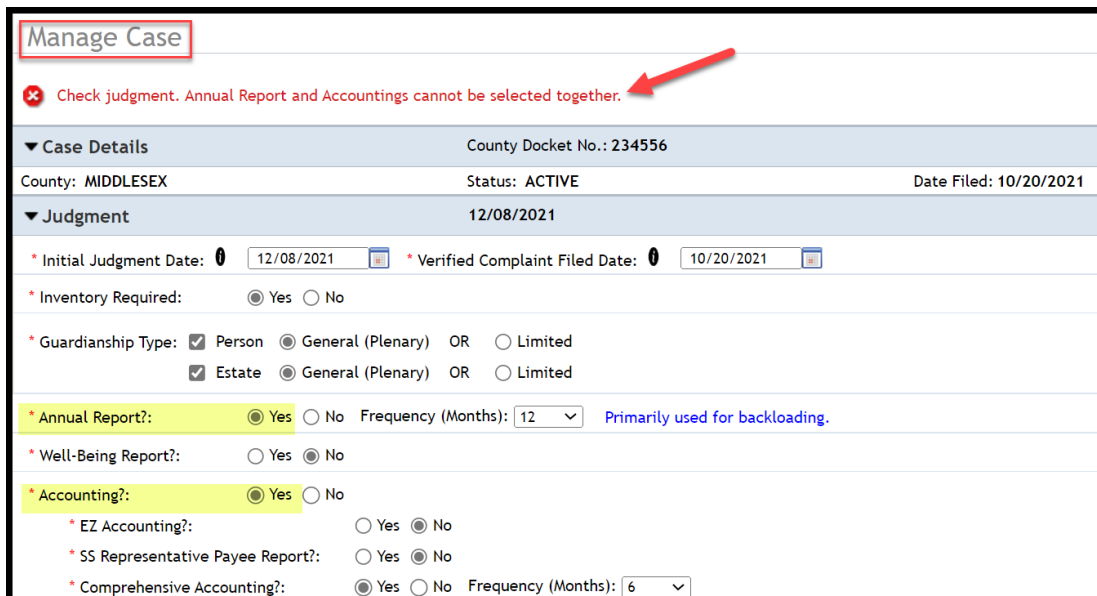
An enhancement has been implemented to prohibit users from selecting incompatible reporting requirements. When an Annual Report is selected, the user will receive an error message if Well-Being or Accounting reports are also selected. The screen cannot be completed until the reporting requirements are appropriate. This enhancement will ensure more accurate data entry which in turn improves the accuracy of noticing.

Prior behavior:



The screenshot shows the 'Manage Case' form for County Docket No. cp-0052-2017. The 'Annual Report?' field is selected 'Yes' with a frequency of 24 months. The 'Well-Being Report?' field is also selected 'Yes' with a frequency of 24 months. Both fields are highlighted with a red box, indicating they were previously allowed to be selected together.

After the enhancement:



The screenshot shows the 'Manage Case' form for County Docket No. 234556. A red error message at the top states: 'Check judgment. Annual Report and Accountings cannot be selected together.' A red arrow points to this message. In this case, 'Annual Report?' is selected 'Yes' with a frequency of 12 months, and 'Accounting?' is selected 'Yes'. The 'Annual Report?' field is highlighted in yellow.

**Note:** this fix is prospective. For existing cases, the error message will display if users touch the reporting fields to make any updates or changes.

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## Upload Document – New Document Types

Three new document types have been added to support the upload of post-judgment pleadings and eliminate the need to use “Case Initiation Documents” or “Other” for the upload of post-judgment pleadings.

- **Post-Judgment Verified Complaint** – used for Verified Complaints filed after the initial Judgment of Incapacity
- **Post-Judgment Court Appointed Attorney Report** – used when a court appointed attorney files a report in connection with a post-judgment Verified Complaint
- **Post-Judgment Motion** – used for any motion filed after the initial Judgment of Incapacity

The screenshot shows the 'eCOURTS HOME' navigation bar with 'CASE MANAGEMENT' and 'UPLOAD DOCUMENT' (highlighted with a red box) selected. The user is 'susan.flynn'. The main area is titled 'Upload Documents' and includes a 'Back' button. Under 'Case Details', the 'County Docket No.' is 'OCN44489'. A 'Documents Due' section states 'There are no documents missing or overdue at this time.' Below this is a 'Select Document Type' button (highlighted with a red box) and a 'Document Type' dropdown menu. A red arrow points from the dropdown to the 'Post-Judgment Verified Complaint' option in the list. Other options include Case Initiation Documents, Judgment, Qualification Documents, Inventory Report, Well-Being Report, SS Representative Payee Report, EZ Accounting Report, Comprehensive Accounting Report, Annual Report, Formal Accounting, Amended Judgment, Subsequent Order, New Report Review Results, Finance Review Results, OTSC-Guardian Background Screening, Post-Judgment Court Appointed Attorney Report, Post-Judgment Motion, and Other. A 'View Case Jacket' link is also visible. 'Back' and 'Continue' buttons are at the bottom right.

Each of these new documents requires the entry of the filed date:

The screenshot shows the 'Select Document Type' form. The 'Document Type' dropdown is set to 'Post-Judgment Verified Complaint'. The 'Filed Date' field (highlighted with a red box) contains '04/06/2022'. To the right is a 'Choose File' button with the text 'No file chosen'. 'Back' and 'Continue' buttons are at the bottom right.

These new document types are for use only for pleadings filed **after** the entry of the initial judgment.

The documents display in the Case Jacket:

**CASE JACKET**
User:susan.flynn

**Docket Number: OCN44489**

[Back](#)
[Create Summary Report](#)

IP Name: ORLANDO ORTIZ  
 Filed Date: 11/02/2021  
 Guardianship Type: PERSON GENERAL(PLENARY) - ESTATE GENERAL(PLENARY)

Venue: OCEAN  
 Case Status: ACTIVE  
 Judgment Date: 12/08/2021

Court Type: GUARDIANSHIP  
 Case Type:  
 Judge: HON. REPORT JUDGE, SR.

IP    Guardians (1)    Attorney

▶ ORLANDO ORTIZ                      Party Type: INCAPACITATED PERSON                      Party Status :ACTIVE

Case Actions

Search:

Filing Date ▲	Filings	Docket Text	Transaction ID	Entry Date	Entered By
04/06/2022		Post-Judgment Verified Complaint	GMP20223390	09/21/2022	susan.flynn
05/25/2022		Post-Judgment Court Appointed Attorney Report	GMP20223391	09/21/2022	susan.flynn
09/12/2022		Post-Judgment Motion	GMP20223392	09/21/2022	susan.flynn

[\(Back\)](#)

## Report Review Fix

A fix has been deployed to Report Review to ensure that multiple updates to the bond fields are now captured correctly in Report Review.

Prior to the fix, if the bond fields were updated from 'Yes' to 'No' (or vice versa) and back again, the update was not reflected in the 'Case Information' section in Report Review. This fix ensures that: 1) data in the system is proper and consistent; and 2) reviews will be routed correctly in Report Review.

Report Review will always reflect the bond fields in Case Management:

✓ Judgment Details saved successfully

▼ Case Details County Docket No.: 22-2004 [View Case Jacket](#)

County: MERCER Status: ACTIVE Date Filed: 02/09/2022

▼ Judgment 04/06/2022

\* Initial Judgment Date: 04/06/2022 \* Verified Complaint Filed Date: 02/09/2022

\* Inventory Required:  Yes  No

\* Guardianship Type:  Person  General (Plenary) OR  Limited  
 Estate  General (Plenary) OR  Limited

\* Annual Report?:  Yes  No *Primarily used for backloading.*

\* Well-Being Report?:  Yes  No Frequency (Months): 12

\* Accounting?:  Yes  No

\* EZ Accounting?:  Yes  No Frequency (Months): 12

\* SS Representative Payee Report?:  Yes  No

\* Comprehensive Accounting?:  Yes  No

\* Bond Required?:  Yes  No

\* Amended Bond?:  Yes  No

Report Review reflects that no bond is required:

8/2/2022 Mercer 22-2004 Inventory 3,451 GMP20222967 New Report [Begin](#)



Docket Number	Name	Judgment Date
22-2004	Arlen Atkins	4/6/2022
Initial Estate Value \$3,450	Bond ---	Transaction ID GMP20222967

[\(Back\)](#)




# eCourts Guardianship – Civil Release Notes 08/26/2022



## eCourts Case Management

	When an accounting is required, the system will now require users to select a particular accounting report type. For more information, click <a href="#">here</a> .
	"Certification of Assets" now displays in the Estate Value Table to reflect the initial estate value entered upon upload of Case Initiation Documents. For more information, click <a href="#">here</a> .

## eCourts Upload Document

	A new document type has been added to the 'Documents' dropdown menu to support the upload of Orders to Show Cause for guardian background screening hearings. For more information, click <a href="#">here</a> .
---	--

## Report Review

	A fix has been deployed to Report Review to capture the estate value entered when an SS Representative Payee Report is uploaded. For more information, click <a href="#">here</a> .
	A fix has been deployed to Report Review to capture updates to the Bond and Amended Bond fields made in Case Management. For more information, click <a href="#">here</a> .

# Case Management Enhancements

## Accounting Fields

An enhancement has been made to require users to select an accounting report type if 'Accounting?' = 'Yes'. Users will not be able to save the screen until a report is selected. This will ensure more accurate data entry which in turn improves the accuracy of noticing.

Prior behavior:

▼ Judgment 04/06/2022

\* Initial Judgment Date: 04/06/2022 \* Verified Complaint Filed Date: 02/09/2022

\* Inventory Required:  Yes  No

\* Guardianship Type:  Person  General (Plenary) OR  Limited  
 Estate  General (Plenary) OR  Limited

\* Annual Report?:  Yes  No *Primarily used for backloading.*

\* Well-Being Report?:  Yes  No Frequency (Months): 12

\* Accounting?:  Yes  No

\* EZ Accounting?:  Yes  No

\* SS Representative Payee Report?:  Yes  No

\* Comprehensive Accounting?:  Yes  No

After the enhancement:

Manage Case

✖ Please select an accounting report type.

▼ Case Details County Docket No.: 22-2004

County: MERCER Status: ACTIVE

▼ Judgment 04/06/2022

\* Initial Judgment Date: 04/06/2022 \* Verified Complaint Filed Date: 02/09/2022

\* Inventory Required:  Yes  No

\* Guardianship Type:  Person  General (Plenary) OR  Limited  
 Estate  General (Plenary) OR  Limited

\* Annual Report?:  Yes  No *Primarily used for backloading.*

\* Well-Being Report?:  Yes  No Frequency (Months): 12

\* Accounting?:  Yes  No

\* EZ Accounting?:  Yes  No

\* SS Representative Payee Report?:  Yes  No

\* Comprehensive Accounting?:  Yes  No

**Note:** this fix is prospective. For existing cases, the error message will display if users touch the 'Accounting?' field to make any updates or changes.

## Estate Value Table

An enhancement to the Estate Value Table has been deployed to more accurately reflect the source of the initial estate value entered upon upload of Case Initiation Documents. The table will now reflect that the value is taken from the Certification of Assets. This change is not prospective; all cases have been updated.

The screenshot shows the 'Manage Case' interface. Under the 'Estate Value' section, the 'Initial Estate Value' is \$3,500. Below this, a table lists transactions:

Date	Estate Value	% Change	Transaction ID	Action	Last Modified By	Modified	Edit
02/09/2022	\$3,500	N/A	GMP20222964	Certification of Assets	susan.flynn		

In the Case Jacket, the docket text will continue to display "Case Initiation Documents" to correctly reflect the bundle of documents uploaded:

The screenshot shows the 'Case Jacket' for docket number 22-2004. Under the 'Case Actions' section, a table lists filings:

Filing Date	Filings	Docket Text	Transaction ID	Entry Date	Entered By
02/09/2022		Case Initiation Documents	GMP20222964	08/17/2022	susan.flynn

([Back](#))

## Upload Document – New Document Type

A new document type has been added to support the upload of Orders to Show Cause issued in connection with guardian background screening hearings.

### Steps:

- 1) Select “OTSC – Guardian Background Screening” from the dropdown menu
- 2) Enter the OTSC filed date in the ‘Filed Date’ field
- 3) If the proposed guardian was appointed after the hearing, select that guardian from the dropdown, otherwise, select “Party Not Appointed”
- 4) Upload the “Proposed Guardian Background Screening Authorization and Checklist” form (and other related documents as appropriate) and click ‘Continue’

The screenshot shows the 'Upload Documents' interface. At the top, there are navigation tabs: 'eCOURTS HOME', 'CASE MANAGEMENT', 'UPLOAD DOCUMENT' (highlighted with a red box), and 'CASE JACKET'. The user is identified as 'susan.flynn'. Below the tabs, there is a 'Back' button and a section for 'Case Details' with 'County Docket No.: 22-2004' and a 'View Case Jacket' link. The 'Documents Due' section lists missing or overdue documents. The 'Select Document Type' section has a dropdown menu with a red circle '1' and an arrow pointing to it. A dropdown menu is open, listing various document types, with 'OTSC-Guardian Background Screening' highlighted in yellow. At the bottom right, there are 'Back' and 'Continue' buttons.

This screenshot shows the 'Select Document Type' form. The 'Document Type' dropdown is set to 'OTSC-Guardian Background Screening'. The 'Filed Date' field contains '03/15/2022' and has a red circle '2' next to it. The 'Guardian(s)' dropdown is set to 'RUTH ZARDO PARTY NOT APPOINTED'. There is a 'Choose File' button and the text 'No file chosen'.

Select Document Type

* Document Type: OTSC-Guardian Background Screenii	* Filed Date: 03/15/2022	* Guardian(s): RUTH ZARDO PARTY NOT APPOINTED	3	Choose File No file chosen
---	-----------------------------	---	---	----------------------------

eCOURTS HOME CASE MANAGEMENT **UPLOAD DOCUMENT** CASE JACKET User: susan.flynn

Upload Documents

Back

OTSC-Guardian Background Screening uploaded successfully

Case Details County Docket No.: 22-2004 [View Case Jacket](#)

Documents Due:

Documents listed below are either missing or overdue, and therefore need to be uploaded.

- Judgment
- Qualification Documents from Guardian ZARDO, RUTH
- Inventory Report from Guardian ZARDO, RUTH

Select Document Type

OTSC-Guardian Background Screening	* Filed Date: 03/15/2022	* Guardian(s): RUTH ZARDO PARTY NOT APPOINTED	OTSC Hearing.pdf	4
------------------------------------	-----------------------------	---	------------------	---

Back Continue

The document(s) displays in the Case Jacket as “OTSC – Background Screening Policy”:

CASE JACKET User: susan.flynn

Docket Number: 22-2004

Back [Create Summary Report](#)

IP Name: ARLEN ATKINS Venue: MERCER Court Type: GUARDIANSHIP  
 Filed Date: 02/09/2022 Case Status: ACTIVE Case Type:  
 Guardianship Type: PERSON GENERAL(PLENARY) - ESTATE Judgment Date: 04/06/2022 Judge:  
 GENERAL(PLENARY)

IP Guardians (1) Attorney

ARLEN ATKINS Party Type: INCAPACITATED PERSON Party Status :ACTIVE

Case Actions

Filing Date	Filings	Docket Text	Transaction ID	Entry Date	Entered By
02/09/2022		Case Initiation Documents	GMP20222964	08/17/2022	susan.flynn
03/15/2022		OTSC-Guardian Background Screening	GMP20222966	08/19/2022	susan.flynn

Showing 1 to 2 of 2 entries

Back

Contact your program coordinator with questions about the document(s) to be uploaded under “OTSC – Guardian Background Screening”.

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## Report Review Fixes

Two fixes have been deployed to Report Review: 1) SS Representative Payee Report values are now included in the estate values displayed in Report Review; and 2) updates to the bond fields are now captured correctly in Report Review.

### SS Representative Payee Report

Prior to this fix, when an SS Representative Payee Report was uploaded, the estate value entered was not included or displayed in the current net estate value displayed in Report Review. The fix ensures that the estate values displayed in the system are consistent and accurate.

Estate Value Table in Case Management:

▼ Estate Value							
Initial Estate Value: \$ 3,450				Current Net Estate Value: \$ 3,451			
Initial Estate Value: <input type="text" value="3,450"/>							
Date	Estate Value	% Change	Transaction ID	Action	Last Modified By	Modified	Edit
08/02/2022	\$3,451	0.03	GMP20222968	SS Representative Payee Report	susan.flynn		
08/02/2022	\$3,450	1.43	GMP20222967	Inventory Report	susan.flynn		
02/09/2022	\$3,500	N/A	GMP20222964	Certification of Assets	susan.flynn		

Case Information in Report Review:

Case Information			
Docket Number	IP Name	Report type	Status
22-2004	Arlen Atkins	Inventory	New Report
Judgment Date	Filed Date	Initial Estate Value	Current Net Estate Value
04/06/2022	08/02/2022	\$3,450	\$3,451
Bond Amount	Transaction ID		
\$5,000	GMP20222967		
Quick Links			
<a href="#">Case Jacket</a>   <a href="#">Inventory</a>			

### Bond Field Updates

Prior to the fix, if the bond fields were updated from 'Yes' to 'No' (or vice versa), the update was not reflected in the 'Case Information' section in Report Review. This fix ensures that: 1) data in the system is proper and consistent; and 2) reviews will be routed correctly in Report Review.

Prior to the fix, if 'Bond Required?' was changed from Yes to No, Report Review would continue to display the bond amount originally entered instead of updating.

* Bond Required?:	<input type="radio"/> Yes	<input checked="" type="radio"/> No
* Amended Bond?:	<input type="radio"/> Yes	<input checked="" type="radio"/> No

### Case Information

Docket Number  
**Morr-123456**

Judgment Date  
08/07/2018

Bond Amount  
**\$30,000**

Now, if a bond goes from Yes to No, 'Case Information' properly displays dashes.

### Steps:

Original case entry, showing a \$5,000 bond is required:

Judgment		04/06/2022	
* Initial Judgment Date:	<input type="text" value="04/06/2022"/>	* Verified Complaint Filed Date:	<input type="text" value="02/09/2022"/>
* Inventory Required:	<input checked="" type="radio"/> Yes <input type="radio"/> No		
* Guardianship Type:	<input checked="" type="checkbox"/> Person <input checked="" type="radio"/> General (Plenary) OR <input type="radio"/> Limited <input checked="" type="checkbox"/> Estate <input checked="" type="radio"/> General (Plenary) OR <input type="radio"/> Limited		
* Annual Report?:	<input type="radio"/> Yes <input checked="" type="radio"/> No <a href="#">Primarily used for backloading.</a>		
* Well-Being Report?:	<input checked="" type="radio"/> Yes <input type="radio"/> No Frequency (Months): <input type="text" value="12"/>		
* Accounting?:	<input checked="" type="radio"/> Yes <input type="radio"/> No		
* EZ Accounting?:	<input checked="" type="radio"/> Yes <input type="radio"/> No Frequency (Months): <input type="text" value="12"/>		
* SS Representative Payee Report?:	<input type="radio"/> Yes <input checked="" type="radio"/> No		
* Comprehensive Accounting?:	<input type="radio"/> Yes <input checked="" type="radio"/> No		
* Bond Required?:	<input checked="" type="radio"/> Yes <input type="radio"/> No	* Initial Bond \$:	<input type="text" value="5,000"/>
		Date of Bond:	<input type="text" value="04/06/2022"/>
		Bond Company:	<input type="text" value="BBC"/>
* Amended Bond?:	<input type="radio"/> Yes <input checked="" type="radio"/> No		

Case is updated to no bond required:

✓ Judgment Details saved successfully

▼ Case Details		County Docket No.: 22-2004	<a href="#">View Case Jacket</a>
County: MERCER	Status: ACTIVE	Date Filed: 02/09/2022	
▼ Judgment		04/06/2022	
* Initial Judgment Date:	<input type="text" value="04/06/2022"/>	* Verified Complaint Filed Date:	<input type="text" value="02/09/2022"/>
* Inventory Required:	<input checked="" type="radio"/> Yes <input type="radio"/> No		
* Guardianship Type:	<input checked="" type="checkbox"/> Person <input type="checkbox"/> General (Plenary) OR <input type="checkbox"/> Limited <input checked="" type="checkbox"/> Estate <input type="checkbox"/> General (Plenary) OR <input type="checkbox"/> Limited		
* Annual Report?:	<input type="radio"/> Yes <input checked="" type="radio"/> No <i>Primarily used for backloading.</i>		
* Well-Being Report?:	<input checked="" type="radio"/> Yes <input type="radio"/> No Frequency (Months): <input type="text" value="12"/>		
* Accounting?:	<input checked="" type="radio"/> Yes <input type="radio"/> No		
* EZ Accounting?:	<input checked="" type="radio"/> Yes <input type="radio"/> No Frequency (Months): <input type="text" value="12"/>		
* SS Representative Payee Report?:	<input type="radio"/> Yes <input checked="" type="radio"/> No		
* Comprehensive Accounting?:	<input type="radio"/> Yes <input checked="" type="radio"/> No		
* Bond Required?:	<input type="radio"/> Yes <input checked="" type="radio"/> No		
* Amended Bond?:	<input type="radio"/> Yes <input checked="" type="radio"/> No		

Report Review updates to reflect that no bond is required:





▼	<input type="text" value="8/2/2022"/>	Mercer	22-2004	Inventory	3,451	GMP20222967	New Report	<input type="button" value="Begin"/>
Docket Number	Name		Judgment Date					
22-2004	Arlen Atkins		4/6/2022					
Initial Estate Value	Bond		Transaction ID					
\$3,450	---		GMP20222967					

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# eCourts Guardianship Report Review – Civil Release Notes 05/13/2022

## Report Review

	A new issue has been added to the 'Issues' dropdown in Report Review to capture a reported change to a guardian's criminal or civil judgment history. For more information, click <a href="#">here</a> .
	An additional search filter has been added to the Case Review tab. For more information, click <a href="#">here</a> .
	The Judge Review work area display has been enhanced to be more user friendly. For more information, click <a href="#">here</a> .
	Verbiage enhancements have been made in the Case Review and Follow-Ups tabs for purposes of clarity. For more information, click <a href="#">here</a> .

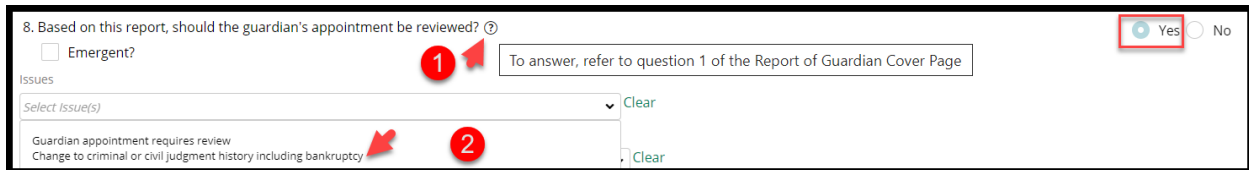
## New Issue in Report Review

A new issue has been added to the 'Issues' dropdown in Report Review to allow users to record changes to a guardian's criminal or civil judgment history including a bankruptcy filing. Changes to a guardian's criminal or civil judgment history are reported on the "Report of Guardian Cover Page" which is required to be filed with all report types.

"Change to criminal or civil judgment history including bankruptcy" now displays in the 'Issues' dropdown for question 8 in Inventory Report reviews and in question 11 in Periodic Report reviews (EZ Accounting Report, Comprehensive Accounting Report, Annual Report).

- 1) A tool tip has been added to direct users to the Report of Guardian Cover Page to determine if a change to judgment history has been reported
- 2) The new issue displays in the 'Issues' dropdown

### Inventory Reports:



8. Based on this report, should the guardian's appointment be reviewed? ⓘ

Emergent?

Issues  Yes  No

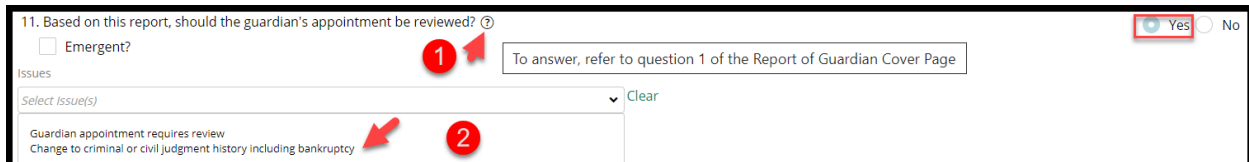
To answer, refer to question 1 of the Report of Guardian Cover Page

Select Issue(s) Clear

Guardian appointment requires review  
Change to criminal or civil judgment history including bankruptcy Clear

Annotations: Red circle '1' with arrow pointing to the question text. Red circle '2' with arrow pointing to the new issue in the dropdown menu.

### Periodic Reports:



11. Based on this report, should the guardian's appointment be reviewed? ⓘ

Emergent?

Issues  Yes  No

To answer, refer to question 1 of the Report of Guardian Cover Page

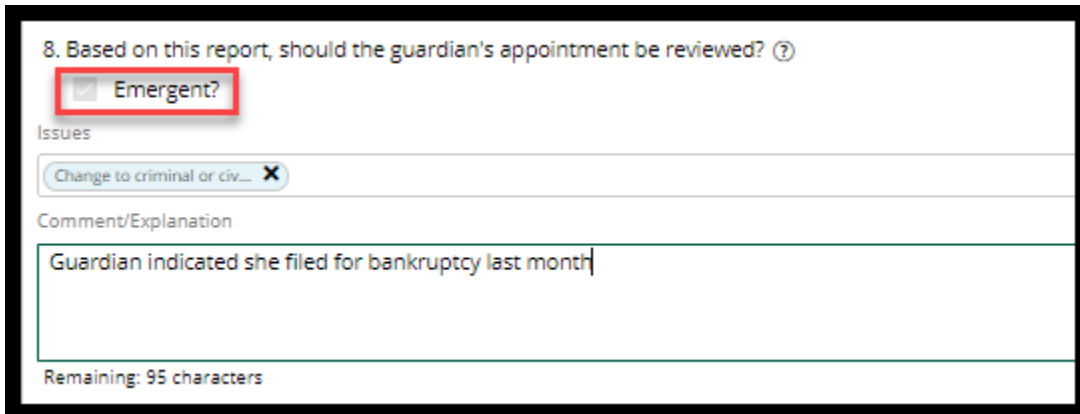
Select Issue(s) Clear

Guardian appointment requires review  
Change to criminal or civil judgment history including bankruptcy Clear

Annotations: Red circle '1' with arrow pointing to the question text. Red circle '2' with arrow pointing to the new issue in the dropdown menu.

In both the 'New Report Review' and 'Case Review' tabs, upon selection of the new issue, the 'Emergent' flag is automatically checked to ensure that these reviews receive prompt attention.

- If this issue is selected during New Report (volunteer level) Review the report will always be routed to Finance Review



8. Based on this report, should the guardian's appointment be reviewed? ?

Emergent?

Issues

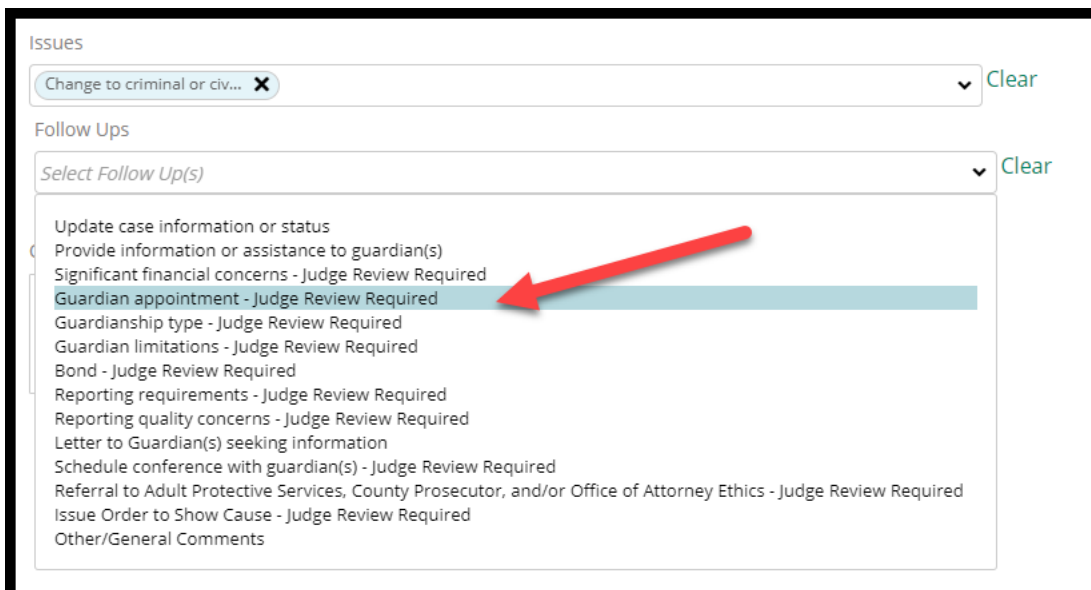
Change to criminal or civ... ×

Comment/Explanation

Guardian indicated she filed for bankruptcy last month

Remaining: 95 characters

- If this issue is selected during Finance Review the report will be marked 'Emergent'
- To send the review to Judge Review, Finance users should select "Guardian appointment – Judge Review Required" from the 'Follow Ups' dropdown list



Issues

Change to criminal or civ... × Clear

Follow Ups

Select Follow Up(s) Clear

- Update case information or status
- Provide information or assistance to guardian(s)
- Significant financial concerns - Judge Review Required
- Guardian appointment - Judge Review Required**
- Guardianship type - Judge Review Required
- Guardian limitations - Judge Review Required
- Bond - Judge Review Required
- Reporting requirements - Judge Review Required
- Reporting quality concerns - Judge Review Required
- Letter to Guardian(s) seeking information
- Schedule conference with guardian(s) - Judge Review Required
- Referral to Adult Protective Services, County Prosecutor, and/or Office of Attorney Ethics - Judge Review Required
- Issue Order to Show Cause - Judge Review Required
- Other/General Comments

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## New Filter Option in 'Case Review'

The ability to filter reviews based on whether issues have been identified has been added to the search feature in the 'Case Review' tab. This feature permits users to quickly locate categories of reviews; for example, all reviews in 'Pending Final Review' with no issues identified.

Steps:

- 1) Click 'Add/Change'
- 2) Select 'Issues' from the search criteria dropdown
- 3) Select 'Yes' or 'No'
- 4) Add additional search criteria if desired and click 'Search'

The screenshot shows the 'Case Review' tab selected. A search filter dialog box is open, titled 'Search and Filter'. The dialog box contains a dropdown menu for 'Search Criteria' with 'Issues' selected, and two buttons for 'Yes' and 'No' under the 'IssuesPresent' label. The 'Search' button is highlighted with a red box. Red circles with numbers 1, 2, 3, and 4 indicate the steps: 1) Click 'Add/Change', 2) Select 'Issues', 3) Select 'Yes' or 'No', and 4) Click 'Search'.

**Example:** All reviews in 'Pending Final Review' status with no issues:

The screenshot shows the 'Case Review' tab selected. The search criteria are 'IssuesPresent: No' and 'Review Status: Pending Final Review'. The results table shows two entries with 'Pending Final Review' status and 'EZ Accounting' report type.

Filed Date	County	Docket Number	Report type	Current Net Estate Value	Status	Attention
11/17/2021	Mercer	20-88772	EZ Accounting	13,132	Pending Final Review	Begin
11/24/2021	Mercer	20-88772	EZ Accounting	13,132	Pending Final Review	Begin

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## Judge Review Enhancements

The performance area in Judge Review has been enhanced to be more user friendly. An instructional message and shading have been added to draw the user's attention to the sections of the review that require attention.

The screenshot displays the 'Judge Review' section of a software interface. At the top, there are tabs for 'Judge Review', 'Finance Review', and 'New Report Review'. Below the tabs, the 'Judge Review' section is titled and contains the instruction: 'Review any issues identified and confirm or modify proposed follow-up actions.' There are five numbered questions, each with 'Yes' and 'No' radio button options. The fifth question has an 'Emergent?' checkbox. Below the questions is an 'Issues' section with a dropdown menu showing 'Summary - Schedule B-E...' and a 'Clear' button. A red arrow points to a message: 'Please confirm or update selections here'. Below this is a 'Follow Ups' section with a dropdown menu showing 'Provide information or a...' and 'Significant financial conc...' and a 'Clear' button. There is a checkbox for 'No Follow Up Needed'. A 'Comment/Explanation' text box contains the text: 'The IP resides in an independent living apartment but the accounting shows disbursements for 2 mortgages.' At the bottom, it says 'Remaining: 44 characters'.

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## Verbiage Updates

Language enhancements have been made to the 'Case Review' and 'Follow-Ups' tabs for ease of use by reviewers.

### Case Review tab

In the 'Case Review' tab, the follow-ups dropdown for reviews in Finance Review and Final Review statuses have been updated to clarify which proposed follow-up actions route reviews to Judge Review. All follow-ups that include "Judge Review Required" route the review to Judge Review if selected.

Follow Ups

Select Follow Up(s) Clear

- Update case information or status
- Provide information or assistance to guardian(s)
- Significant financial concerns - Judge Review Required
- Guardian appointment - Judge Review Required
- Guardianship type - Judge Review Required
- Guardian limitations - Judge Review Required
- Bond - Judge Review Required
- Reporting requirements - Judge Review Required
- Reporting quality concerns - Judge Review Required
- Letter to Guardian(s) seeking information
- Schedule conference with guardian(s) - Judge Review Required
- Referral to Adult Protective Services, County Prosecutor, and/or Office of Attorney Ethics - Judge Review Required
- Issue Order to Show Cause - Judge Review Required
- Other/General Comments

### Follow-Ups tab

The follow-up actions selected display on the workbasket in the 'Follow-Ups' tab when the + is clicked. The action language has been enhanced and expanded to provide more clarity for the user regarding what action should be taken:

Filed Date	County	Docket Number	Report type	Transaction ID	Follow Ups	Status	Attention
+ 5/5/2022	Mercer	20-88772	Inventory	GMP20221223	Review bond (Judge) Review for reporting quality concerns (Judge) Review for significant financial concerns (Judge) Review guardian appointment (Judge) Review guardian limitations (Judge) Review guardianship type (Judge) Review reporting requirements (Judge)	Pending Follow-Ups	Emergent <span>Begin</span>

Similar updates have been made in the performance area of the review:

7. Based on the current estate value and the guardian's relationship with the IP, are the guardian reporting requirements appropriate?	Response	Emergent?
No	No	No
Issue List		
Reporting requirements need review		
Comment/Explanation		
test		
<b>Follow-Up Actions</b>	<b>Closed</b>	
Review guardianship type (judge)	<input type="checkbox"/>	
Review guardian limitations (judge)	<input type="checkbox"/>	
Review for reporting quality concerns (judge)	<input type="checkbox"/>	
Review reporting requirements (judge)	<input type="checkbox"/>	

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# eCourts Guardianship – Civil Release

## Notes

### 03/18/2022

#### Case Management

<b>Enhanced</b>	The 'Verified Complaint Filed Date' field has been locked to all users except Civil Practice users. For more information, click <a href="#">here</a> .
<b>Fixed</b>	A fix has been deployed to eliminate an intermittent 'Error Occurred' message. For more information, click <a href="#">here</a> .



## Verified Complaint Filed Date Field Locked

To protect the 'Verified Complaint Filed Date' field from updates that may impact the Case Jacket, the field has been locked to all users except Program Coordinators.

A tool tip has been added to advise users to contact their Program Coordinator if the field does need to be updated. The Program Coordinators will make any required updates.

The screenshot shows the 'Manage Case' page for County Docket No. mer-2017-1. The 'Verified Complaint Filed Date' field is set to 11/04/2016 and is locked. A tooltip message reads: "Contact Program Coordinator to make edits to this date." A red arrow points to the tooltip.

Program Coordinator view:

The screenshot shows the 'Manage Case' page for County Docket No. mer-2017-1. The 'Verified Complaint Filed Date' field is set to 11/04/2016 and is unlocked. A calendar dropdown is open, showing the date 11/04/2016. A red arrow points to the calendar dropdown.

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## Code Fix Deployment

A fix has been deployed to minimize the occurrence of the “Error Occurred” message that users reported while working in eCourts Guardianship:


Example of error:




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# eCourts Guardianship – Civil Release Notes 02/04/2022

## Case Management and Upload Document

	The judge and institution dropdown menus in the 'Case Management' and 'Upload Document' tabs are now in alphabetical order. For more information, click <a href="#">here</a> .
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## Upload Document – Case Creation

	Duplicate cases will no longer be mistakenly created if users click on non-system buttons after the creation of a new case. For more information, click <a href="#">here</a> .
---	--

## Judge and Institution Dropdown Menus

The judge and institution dropdown menus have been arranged in alphabetical order for ease of use.

### Judge Dropdown menus

The judge dropdown menus in all tabs have been arranged in alphabetical order by last name. To locate the judge to be entered, click the letter key of the last name. For example, clicking "C" will move the cursor through the list of last names starting with "C".

### Case Management:

- Open the 'Judgment' accordion
- Click on the dropdown menu next to 'Judge Name'

eCOURTS HOME		CASE MANAGEMENT	UPLOAD DOCUMENT	CASE JACKET	User: susan.flynn
Case Search	Report Review				
Manage Case					
▼ Case Details	County Docket No.: 21-100			<a href="#">View Case Jacket</a>	
County: MERCER	Status: ACTIVE	Date Filed: 08/11/2021			
▶ Judgment	10/28/2021				
▶ Estate Value	Initial Estate Value: \$	Current Net Estate Value: \$			
▶ Incapacitated Person (IP) Profile	NELLA NORCROSS	STATUS: ACTIVE			
▶ IP Attorney Profile	PHOEBE CHRISTIAN BENTLEY	STATUS: INACTIVE			
▶ Guardian Profile	CHASE BANK	Appointment Date:	STATUS: ACTIVE		
▶ Guardian Profile	NEW INSTITUTION	Appointment Date:	STATUS: ACTIVE		
▶ Case Action					

Other Rights Retained:  Yes  No

\* Judge Name: KOPROWSKI, WALTER JR

Judgment Comments:

- BERMAN, GLENN J
- BUCZYNSKI, FRANK A
- CARROLL, HARRY G
- CAVANAGH, THOMAS W JR
- CIUFFANI, FRANK M
- CLEARY, PATRICIA DELBUENO

## Upload Document – Case Creation:

To add a judge who is not listed in the dropdown menu click “N” and select “Not Listed” to save the case. Contact your program coordinator to add a judge to the dropdown menu. After the new judge is added, the case can be updated through Case Management.

The screenshot displays the 'eCOURTS HOME' interface with the 'UPLOAD DOCUMENT' tab selected. The user is identified as 'susan.flynn'. The page title is 'Initial Complaint and Judgment Details'. A 'Back' button is visible at the top left. A warning message states: 'Please verify the docket number for accuracy. Once submitted, the docket number cannot be modified.' The form includes the following fields and options:

- County: WARREN (dropdown)
- County Docket Number: 22-0001 (text input)
- Verified Complaint Filed Date: 01/01/2022 (calendar icon)
- Initial Judgment Date: 02/02/2022 (calendar icon)
- Guardianship Type:  Person,  General (Plenary) OR  Limited;  Estate,  General (Plenary) OR  Limited
- Inventory Required:  Yes  No
- Annual Report?:  Yes  No (Note: Primarily used for backloading.)
- Well-Being Report?:  Yes  No, Frequency (Months): 12 (dropdown)
- Accounting?:  Yes  No
- Bond Required?:  Yes  No
- Guardian(s) Limitations?:  Yes  No
- Firearms Rights Retained?:  Yes  No  Undetermined
- Other Rights Retained?:  Yes  No
- Judge Name: (dropdown menu) (Select the most recent judge to issue an order in this case.)
- Judgment Comments: (text area)

The dropdown menu for 'Judge Name' is open, showing a list of judges: BERMAN, GLENN J; BUCZYNSKI, FRANK A; CARROLL, HARRY G; CAVANAGH, THOMAS W JR; CIUFFANI, FRANK M; CLEARY, PATRICIA DELBUENO; COLALILLO, MARY EVA; CONFORTI-PAN, J PETER III; CONTILLO, ROBERT P; COYLE, JOHN J JR; GEIGER, RICHARD J; JACOBSON, MARY C; JUDGE, REPORT SR; KOPROWSKI, WALTER JR; MALLESTEIN, ROBERT; MCDONNELL, ANNE; NOT LISTED; RUBIN, STEPHEN B; SUTER, KAREN L. A red arrow points to the 'NOT LISTED' option. At the bottom right, there are 'Back' and 'Continue' buttons. The screen ID is ECGM0130.

# Upload Document – Uploading a Subsequent Order:

eCOURTS HOME | CASE MANAGEMENT | **UPLOAD DOCUMENT** | CASE JACKET

**Upload Documents**

▼ Case Details County Docket No.: 22-0001

**Documents Due:**

Documents listed below are either missing or overdue, and therefore need to be uploaded.

- Case Initiation Documents (To ensure proper noticing, please upload Qualification Documents separately.)
- Judgment

**Select Document Type**

	* Document Type: Case Initiation Documents			* Net Estate Value: 0
	* Document Type: Subsequent Order	* Filed Date: 02/02/2022	* Judge Name: ▼	
			BERMAN, GLENN J BUCZYNSKI, FRANK A CARROLL, HARRY G CAVANAGH, THOMAS W JR CIUFFANI, FRANK M CLEARY, PATRICIA DELBUENO COLALILLO, MARY EVA CONFORTI-PAN, J PETER III CONTILLO, ROBERT P COYLE, JOHN J JR GEIGER, RICHARD J JACOBSON, MARY C JUDGE, REPORT SR KOPROWSKI, WALTER JR MALESTEIN, ROBERT MCDONNELL, ANNE NOT LISTED RUBIN, STEPHEN B SUTER, KAREN L	

Screen ID: ECGM1040 | Copyright NJ Judiciary 2014

## Institution Dropdown menus

To locate an institution, click the letter key of the name of the institution. For example, clicking "N" will move the cursor through the list of institutions that begin with "N".

## Case Management:

The screenshot displays the 'eCOURTS HOME' interface with the 'CASE MANAGEMENT' tab selected. The user is identified as 'susan.flynn'. The main section is titled 'Manage Case' and shows details for County Docket No. 21-100. The case is in 'MERCER' County, 'ACTIVE' status, filed on 08/11/2021, with a judgment date of 10/28/2021. The guardian profile is 'NEW INSTITUTION' with an appointment date of 08/11/2021. A search dropdown for 'Institution Name' is open, showing a list of institutions including BOFA, CHASE BANK, LEGAL SERVICES OF NORTHWEST NEW JERSEY, NEW INSTITUTION, NOT LISTED, PUBLIC ADVOCATE NOW KNOWN AS PUBLIC DEFENDER, PUBLIC DEFENDER, RUTGERS COMMUNITY LAW CLINIC, and WELLS FARGO. A red arrow points to the dropdown menu.

Case Details	County Docket No.: 21-100	<a href="#">View Case Jacket</a>
County: MERCER	Status: ACTIVE	Date Filed: 08/11/2021
Judgment	10/28/2021	
Estate Value	Initial Estate Value: \$	Current Net Estate Value: \$
Incapacitated Person (IP) Profile	NELLA NORCROSS	STATUS: ACTIVE
IP Attorney Profile	PHOEBE CHRISTIAN BENTLEY	STATUS: INACTIVE
Guardian Profile	CHASE BANK	Appointment Date: STATUS: ACTIVE
Guardian Profile	NEW INSTITUTION	Appointment Date: STATUS: ACTIVE

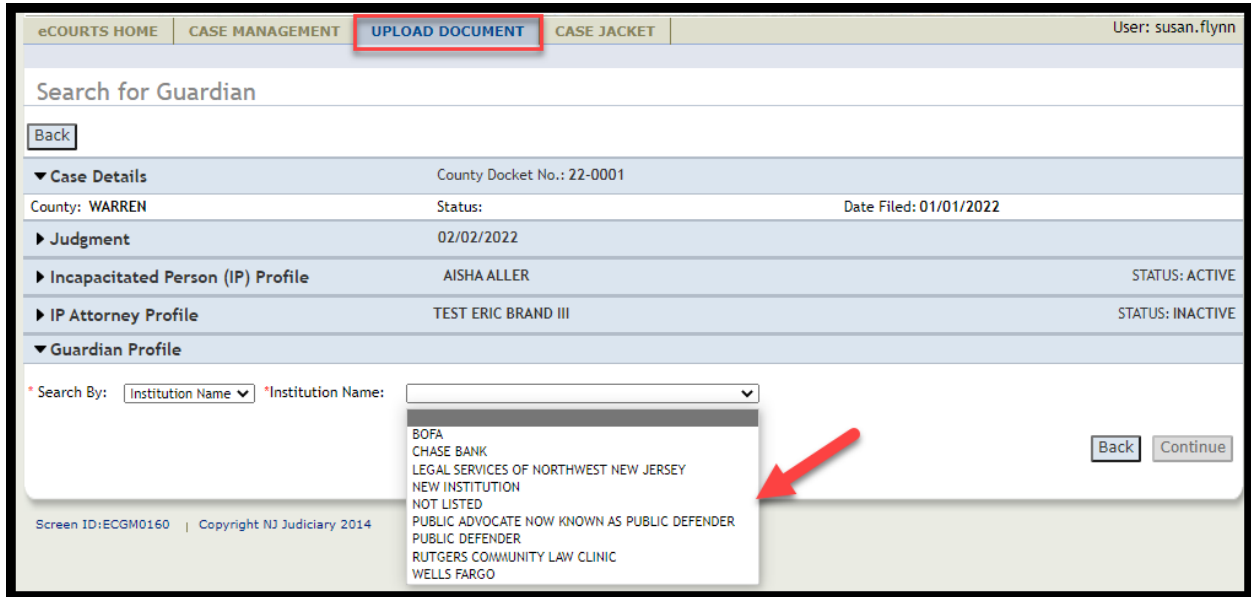
Search By: Institution Name \* Institution Name: Appointment Date:

- BOFA
- CHASE BANK
- LEGAL SERVICES OF NORTHWEST NEW JERSEY
- NEW INSTITUTION
- NOT LISTED
- PUBLIC ADVOCATE NOW KNOWN AS PUBLIC DEFENDER
- PUBLIC DEFENDER
- RUTGERS COMMUNITY LAW CLINIC
- WELLS FARGO

Find New Case

## Upload Document – Case Creation:

To add an institution that is not listed in the dropdown menu, click “N”, and select “Not Listed” to save the case. Contact your program coordinator to add an institution to the dropdown menu. After the new institution is added, the case can be updated through Case Management.



The screenshot shows the 'eCOURTS HOME' interface with the 'UPLOAD DOCUMENT' tab selected. The user is 'susan.flynn'. The page displays case details for County: WARREN, County Docket No.: 22-0001, Status: 02/02/2022, and Date Filed: 01/01/2022. The 'Guardian Profile' section is active, showing 'AISHA ALLER' (STATUS: ACTIVE) and 'TEST ERIC BRAND III' (STATUS: INACTIVE). A search for the guardian institution is in progress, with a dropdown menu open showing the following options: BOFA, CHASE BANK, LEGAL SERVICES OF NORTHWEST NEW JERSEY, NEW INSTITUTION, NOT LISTED, PUBLIC ADVOCATE NOW KNOWN AS PUBLIC DEFENDER, PUBLIC DEFENDER, RUTGERS COMMUNITY LAW CLINIC, and WELLS FARGO. A red arrow points to the 'NOT LISTED' option. There are 'Back' and 'Continue' buttons at the bottom right of the search area.

[\(Back\)](#)



## Fix for Case Duplication Issue

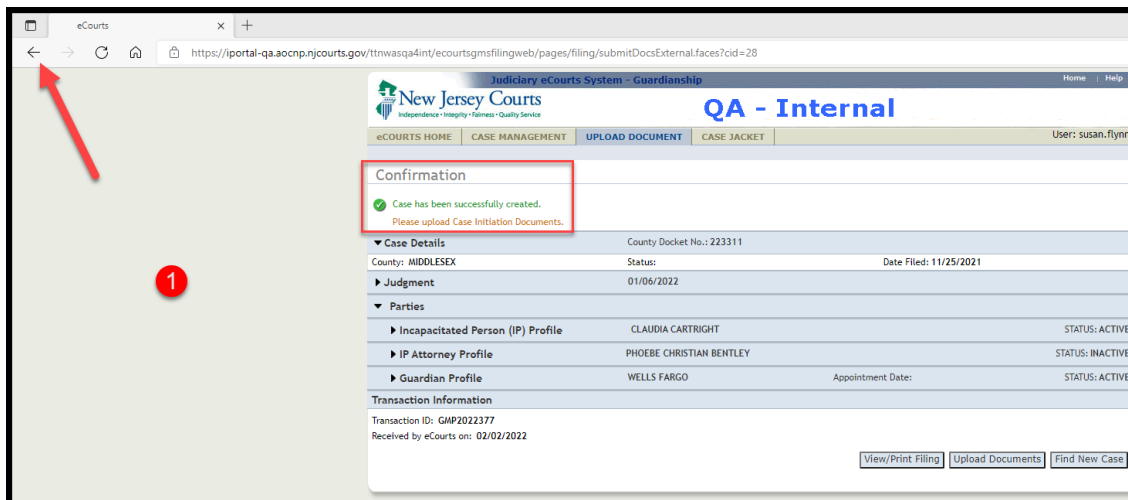
A fix has been added to ensure that duplicate cases are not created if users click on non-system buttons after creation of a new case. An error message now displays with instructions directing the user to the correct tab.

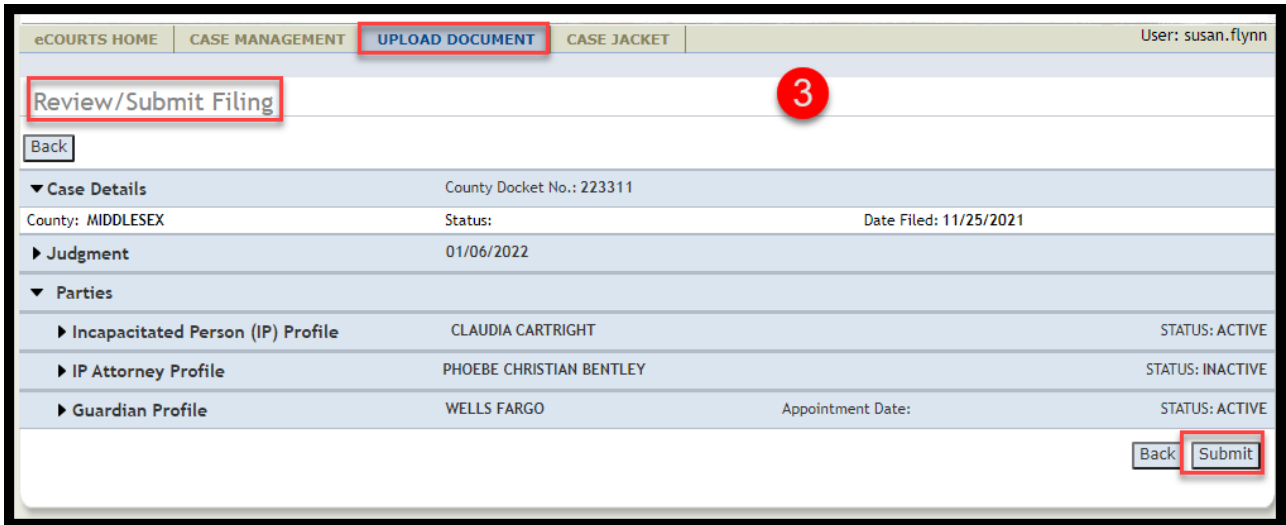
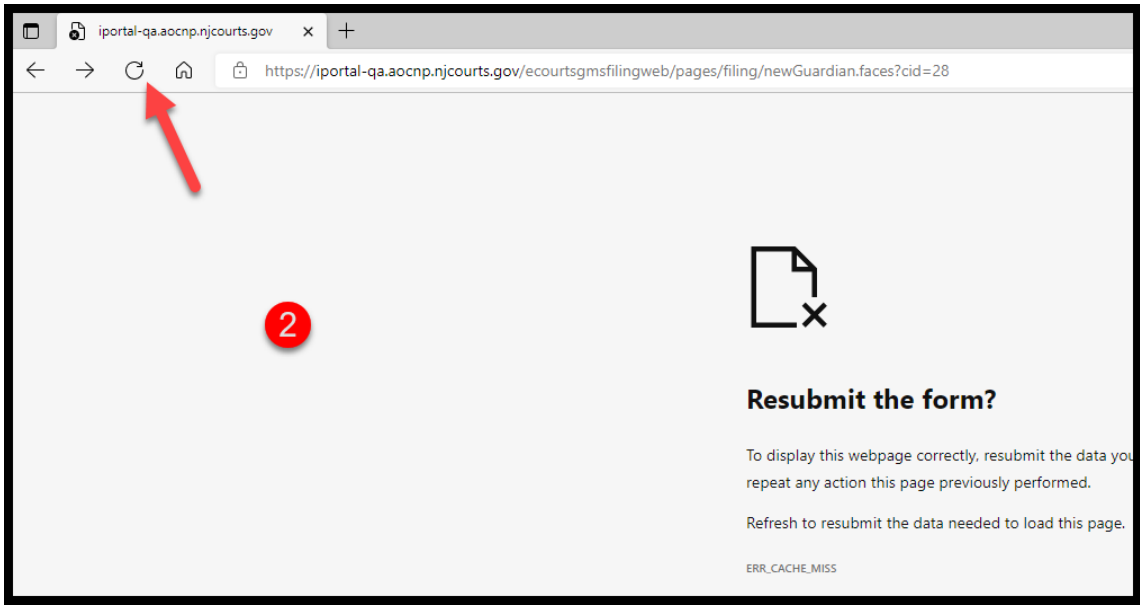
Previously, the following steps resulted in a duplicate case being entered into eCourts:

1. After successful creation of a new case, clicking the back browser button from the 'Confirmation' screen.

**Note:** Use of non-system buttons is never recommended. If the system permits users to move back, a 'Back' button will be provided.

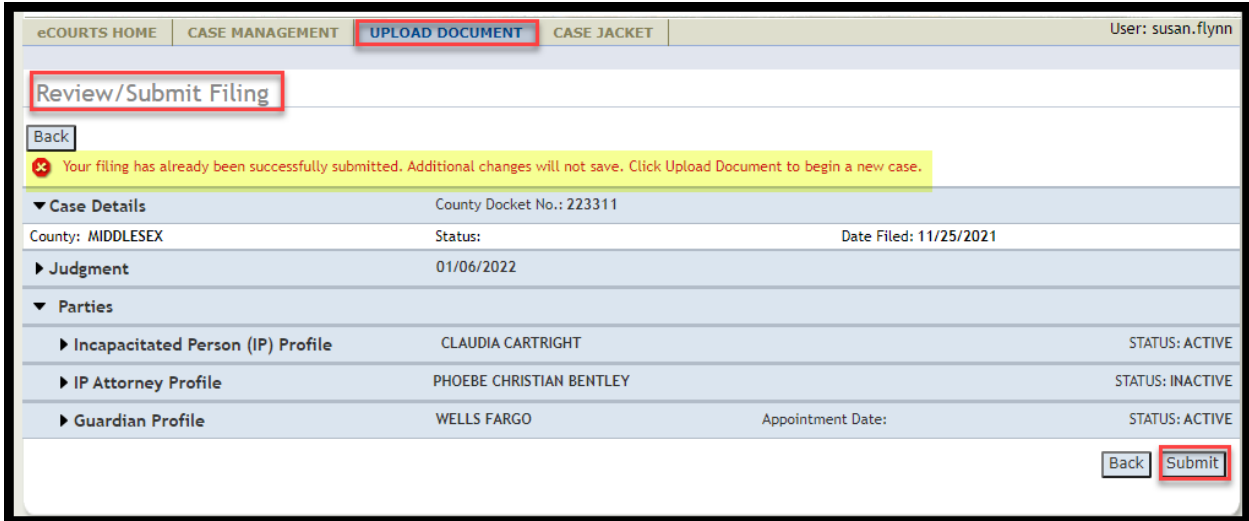
2. Clicking 'Refresh'
3. Clicking the 'Submit' button after the screen re-loads





**Now:**

- Duplicate cases are not created when 'Submit' is selected
- An error message displays and directs the user to the 'Upload Document' tab



[\(Back\)](#)



# eCourts – Civil Guardianship Report Review Release Notes

11/19/2021

## Report Review

New

Report Review has been enhanced to implement the automated “Minnesota Model”, which focuses Finance’s attention on higher estate value reports. For more information, click [here](#).

## Automated MN Model Review Routing

Report Review has been enhanced to include the MN Model of automated report routing from New Report Review to Finance Review. Specifically, all reports with a bond in an amount greater than \$0 and/or a report level net estate value of \$10,000 or greater will be routed from New Report Review to Finance for review.

This enhancement streamlines the review process and focuses Finance review where it has been most needed historically.

- Volunteers will continue to review all reports
- Routing will occur whether or not issues are identified in New Report Review
- The criteria are “and/or” so only 1 of the criterion must be met to trigger the routing
- The MN Model focuses Finance’s attention on reports with higher net estate values and bonds

Bond information is located in the Case Information section of each review:

Case Information			
Docket Number	IP Name	Report type	Status
20-9000	Elizabeth Hawksmith	Inventory	New Report
Judgment Date	Filed Date	Initial Estate Value	Current Net Estate Value
02/10/2021	10/26/2021	\$76,890	\$0
Bond Amount	Transaction ID		
\$5,600	GMP20214751		
Quick Links			
Case Jacket   Inventory			

The report level net estate value is located in the final question in every review:

New Report Review	
Answer all questions below based on comparison to the Certification of Assets.	
1. Is the reporting period correct?	<input type="radio"/> Yes <input type="radio"/> No
2. Is the correct reporting form used?	<input type="radio"/> Yes <input type="radio"/> No
3. Does the report contain all required information?	<input type="radio"/> Yes <input type="radio"/> No
4. Is the information reported consistent with the income/assets/liabilities/encumbrances reported in the Certification of Assets?	<input type="radio"/> Yes <input type="radio"/> No
5. Do the liabilities/encumbrances match the IP's condition and residential arrangement?	<input type="radio"/> Yes <input type="radio"/> No
6. Based on the current estate value, is the bond amount appropriate?	<input type="radio"/> Yes <input type="radio"/> No
7. Based on the current estate value and the guardian's relationship with the IP, are the guardian reporting requirements appropriate?	<input type="radio"/> Yes <input type="radio"/> No
8. Based on this report, should the guardian's appointment be reviewed?	<input type="radio"/> Yes <input type="radio"/> No
9. Are there other areas of concern?	<input type="radio"/> Yes <input type="radio"/> No
10. Are there mathematical errors in the report?	<input type="radio"/> Yes <input type="radio"/> No
11. Net Estate Value (NEV) for this report	<input type="text" value="\$10,000"/>

## Examples of MN Model Operation:


### No Issues Identified in New Report Review

No issues are identified, there is a bond > \$0 and the report level net estate value is

\$10,000. The report will route to Finance when  is clicked:


**New Report Review**

Answer all questions below based on comparison to the Certification of Assets.

1. Is the reporting period correct?  Yes  No
2. Is the correct reporting form used?  Yes  No
3. Does the report contain all required information?  Yes  No
4. Is the information reported consistent with the income/assets/liabilities/encumbrances reported in the Certification of Assets?  Yes  No
5. Do the liabilities/encumbrances match the IP's condition and residential arrangement?  Yes  No
6. Based on the current estate value, is the bond amount appropriate?  Yes  No
7. Based on the current estate value and the guardian's relationship with the IP, are the guardian reporting requirements appropriate?  Yes  No
8. Based on this report, should the guardian's appointment be reviewed?  Yes  No
9. Are there other areas of concern?  Yes  No
10. Are there mathematical errors in the report?  Yes  No
11. Net Estate Value (NEV) for this report  

Review Submitted.			
Case Information			Status
Docket Number	IP Name	Report type	Pending Finance Review Current Net Estate Value
20-9000	Elizabeth Hawksmith	Inventory	
Judgment Date	Filed Date	Initial Estate Value	
02/10/2021	10/26/2021	\$76,890	
Bond Amount	Transaction ID		
\$5,600	GMP20214751		
Case Jacket has been updated with a report summary, transaction ID GMP20215304			

## Issues Identified in New Report Review

Non-emergent issues identified, there is a bond > \$0 and the report level net estate value is < \$10,000. The report will route to Finance when  is clicked:

**New Report Review**

Please review and confirm responses below before final submission.

1. Is the reporting period correct?	Yes
2. Is the correct reporting form used?	Yes
3. Does the report contain all required information?	Yes
4. Is the information reported consistent with the income/assets/liabilities/encumbrances reported in the Certification of Assets?	Yes
5. Do the liabilities/encumbrances match the IP's condition and residential arrangement?	Yes
6. Based on the current estate value, is the bond amount appropriate? Emergent?	No
No	
Issue List	Comment/Explanation
Bond	Testing routing
7. Based on the current estate value and the guardian's relationship with the IP, are the guardian reporting requirements appropriate?	Yes
8. Based on this report, should the guardian's appointment be reviewed?	No
9. Are there other areas of concern?	No
10. Are there mathematical errors in the report?	No
11. Net Estate Value (NEV) for this report	\$6,543
Additional Review Required?	Yes

**Note:** 'Additional Review Required?' will default to 'Yes' if bond is > \$0 **and/or** if the report level net estate value is \$10,000 or more.

**Review Submitted.**

<b>Case Information</b>			
Docket Number	IP Name	Report type	Status
12347	Martha Baker	Inventory	Pending Finance Review
Judgment Date	Filed Date	Initial Estate Value	Current Net Estate Value
01/02/2013	10/20/2021	\$6,666	\$6,543
Bond Amount	Transaction ID		
\$3,000	GMP20214743		

Case Jacket has been updated with a report summary, transaction ID GMP20215305

[\(Back\)](#)

# eCourts – Civil Guardianship Report Review Release Notes

08/13/2021

## Report Review

New

Additional review functionality has been added to Report Review. The Follow-Ups workbasket is now available for users. For more information, click [here](#).



## Follow-Ups Review Functionality

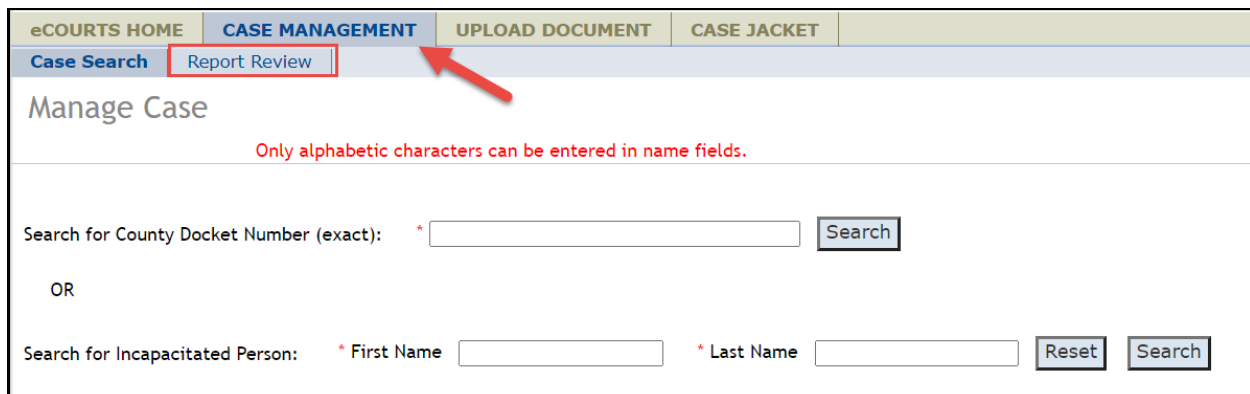
The Follow-Ups tab functionality is now complete. With the addition of the Follow-Ups tab, users can track the advancement of a report all the way through Report Review, providing transparency at each level of review for users.

Users now have:

- 1) a workbasket dedicated to reviews that require follow-up actions to be completed
- 2) the ability to record within the system when follow-up actions are completed

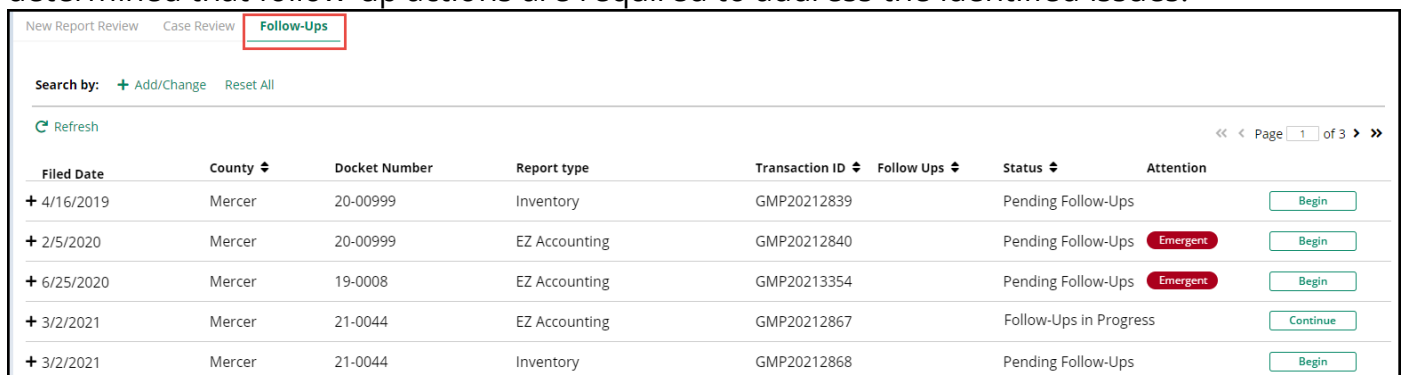
## Accessing Report Review

The Report Review subtab is located in the Case Management tab:



The screenshot shows the top navigation bar with tabs: eCOURTS HOME, CASE MANAGEMENT, UPLOAD DOCUMENT, and CASE JACKET. Below this is a sub-tab bar with Case Search and Report Review. The Report Review tab is highlighted with a red box, and a red arrow points to it. Below the sub-tab bar is the 'Manage Case' section with a red warning message: 'Only alphabetic characters can be entered in name fields.' There are two search sections: 'Search for County Docket Number (exact):' with a search button, and 'Search for Incapacitated Person:' with fields for First Name and Last Name, and Reset and Search buttons.

The Follow-Ups tab contains reviews that have follow-up actions to be addressed. This occurs when issues have been identified in the review process and it has been determined that follow-up actions are required to address the identified issues.



The screenshot shows the 'Follow-Ups' tab selected. It displays a table with columns: Filed Date, County, Docket Number, Report type, Transaction ID, Follow Ups, Status, and Attention. The table contains five rows of data. The 'Attention' column has buttons: 'Begin' for 'Pending Follow-Ups' and 'Continue' for 'Follow-Ups in Progress'. Two rows have a red 'Emergent' label next to the 'Status' column.

Filed Date	County	Docket Number	Report type	Transaction ID	Follow Ups	Status	Attention
+ 4/16/2019	Mercer	20-00999	Inventory	GMP20212839		Pending Follow-Ups	<a href="#">Begin</a>
+ 2/5/2020	Mercer	20-00999	EZ Accounting	GMP20212840		Pending Follow-Ups	<b>Emergent</b> <a href="#">Begin</a>
+ 6/25/2020	Mercer	19-0008	EZ Accounting	GMP20213354		Pending Follow-Ups	<b>Emergent</b> <a href="#">Begin</a>
+ 3/2/2021	Mercer	21-0044	EZ Accounting	GMP20212867		Follow-Ups in Progress	<a href="#">Continue</a>
+ 3/2/2021	Mercer	21-0044	Inventory	GMP20212868		Pending Follow-Ups	<a href="#">Begin</a>

Clicking the + symbol opens an expanded view that contains a list of the follow-up actions to be completed for that report:

6/1/2021	Mercer	21-00555	Comprehensive Accounting	GMP20213081	Pending Follow-Ups	<a href="#">Begin</a>
<div style="border: 1px solid red; padding: 5px;"> <ul style="list-style-type: none"> <li>Letter to Guardian(s) seeking information</li> <li>Provide information or assistance to guardian(s)</li> <li>Significant financial concerns</li> </ul> </div>						

To open a review, click the 'Begin' button for a new review or the 'Continue' button to work on a review in progress.

As at the other levels of Report Review, each review contains 3 sections:

- Case Information – displays case details
- Performance Area – where the work is completed, and also includes read-only review results from the prior levels of review
- Audit/Draft Notes – case actions and notes entered

Case Information			
Docket Number	IP Name	Report type	Status
21-00334	Jasper Johnson	Comprehensive Accounting	Follow-Ups in Progress
Judgment Date	Filed Date	Initial Estate Value	Current Net Estate Value
03/03/2021	08/02/2021	\$8,500	\$2,300,000
Bond Amount	Transaction ID		
\$8,500	GMP20213753		
<b>Quick Links</b>			
<a href="#">Case Jacket</a>   <a href="#">Comprehensive Accounting</a>			

<a href="#">Close Follow-Ups</a>	<a href="#">Judge Review</a>	<a href="#">Finance Review</a>	<a href="#">New Report Review</a>
<a href="#">Close Follow-Ups</a>			

Audit		
Time	Description	Performed by
08/12/2021 10:44 AM	Report Review saved as draft.	susan.flynn
08/12/2021 09:25 AM	Report Review saved as draft.	susan.flynn
08/12/2021 09:25 AM	Follow-Up - Significant financial concerns complete.	susan.flynn
08/12/2021 09:25 AM	Review Status changed to Follow-Ups in Progress.	susan.flynn

<< < Page 1 of 2 > >>

## Completing Follow-Up Actions

Follow-Ups users will be performing the required follow-up actions outside the system and recording the *completion* of the actions in the system.

For each issue, the following information is displayed:

- 1) The review question
- 2) The response and whether the issue is emergent
- 3) The specific issue or issues
- 4) Comments entered by the prior reviewer(s)
- 5) The list of follow-up actions to be completed

3. Does the report contain all required information? 1

Response No Emergent? Yes 2

Issue List 3  
Incomplete

Comment/Explanation 4  
The report is incomplete

Follow-Up Actions 5 Closed

Letter to Guardian(s) seeking information

Provide information or assistance to guardian(s)

When an action is completed, check off the action:

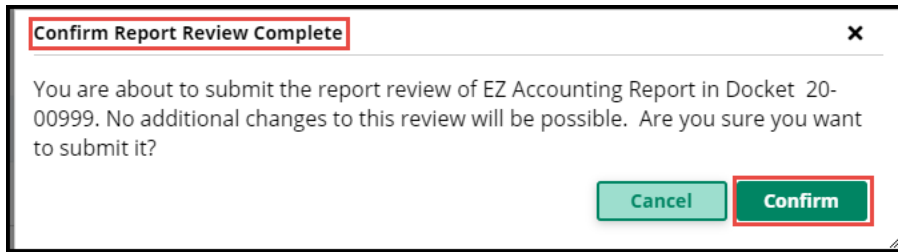
Follow-Up Actions Closed

Letter to Guardian(s) seeking information

Provide information or assistance to guardian(s)

If all follow-ups are completed, the 'Submit' button will be enabled and the review can be completed:

Cancel Save Submit



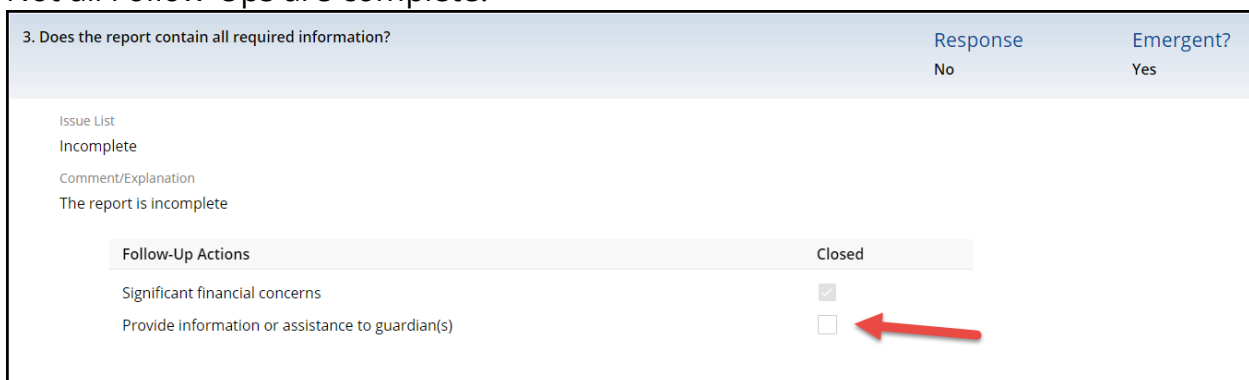
Upon confirmation that the review process is complete, a confirmation displays and a PDF summary is automatically uploaded to the Case Jacket. The review falls off the workbasket because the review process is concluded for this report.

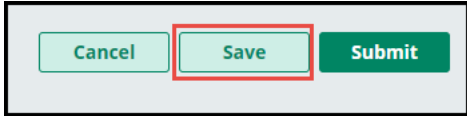


### Saving a Review in Progress as a Draft

To save a review in progress when one or more of the follow-ups is not completed click 'Save'. Add comments and click 'Add'. The review will be saved as a draft and the status on the workbasket will be 'Follow-Ups in Progress':

Not all Follow-Ups are complete:





**Add Draft Note** ✕

---

Will complete the remaining follow-ups later in the week.

Remaining: 93 characters

Cancel **Add**

Reviews can be saved as draft multiple times.

When the review is re-opened, the comments entered will be saved in the Draft Notes tab:

Audit: <b>Draft Notes</b>		
Time	Description	Performed By
08/12/2021 10:44 AM	Follow-Ups in Progress: Will complete the remaining follow-ups later in the week.	susan.flynn

## Follow-Ups Selected More Than Once


Sometimes the same follow-up action is selected for more than one issue. The system will display a tool tip to remind users to address each issue in one follow-up action if possible. For example, if information needs to be provided to a guardian relating to more than 1 issue in the report, all the information should be provided in one communication if possible.

12. **Are there other areas of concern?**

Issue List  
Beginning cash balance does not match ending balance of prior report

Comment/Explanation  
added after return

Follow-Up Actions Closed

Provide information or assistance to guardian(s)  


This follow-up has been selected for multiple issues in this review. Before closing, make sure the follow-up action taken addresses each issue that requires this action.

13. **Are there mathematical errors in the report?**

Issue List  
Assets - Schedule D: Pension, Retirement Accounts  
Summary - Schedule B-4: All Other Disbursements  
Assets - Schedule B: Stocks, Bonds

Comment/Explanation  
added after return

Follow-Up Actions Closed

Provide information or assistance to guardian(s)  

Additional guidance can be found in the Quick Reference Guides (QRGs) located at: <https://intranet.njcourts.gov/adminoffices/atcsu/?d=Guardianship#eCourts>




<b>ATCSU Manuals</b>
<a href="#">Civil</a> <a href="#">Criminal</a> <a href="#">eCourts</a> <a href="#">Family</a>
Division: <input type="text" value="Guardianship"/>
<b>Title</b>
<b>Guardianship - Quick Reference Guide</b>

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# eCourts – Civil Guardianship Report Review Release Notes

06/25/2021

## Report Review

	Additional review functionality has been added to Report Review. Finance Review, Final Review and Judge Review are complete. For more information, click <a href="#">here</a> .
	A Follow-Ups workbasket has been added. For more information, click <a href="#">here</a> .
	A new metric report has been added to the Reporting link. For more information, click <a href="#">here</a> .



## Expanded Review Functionality

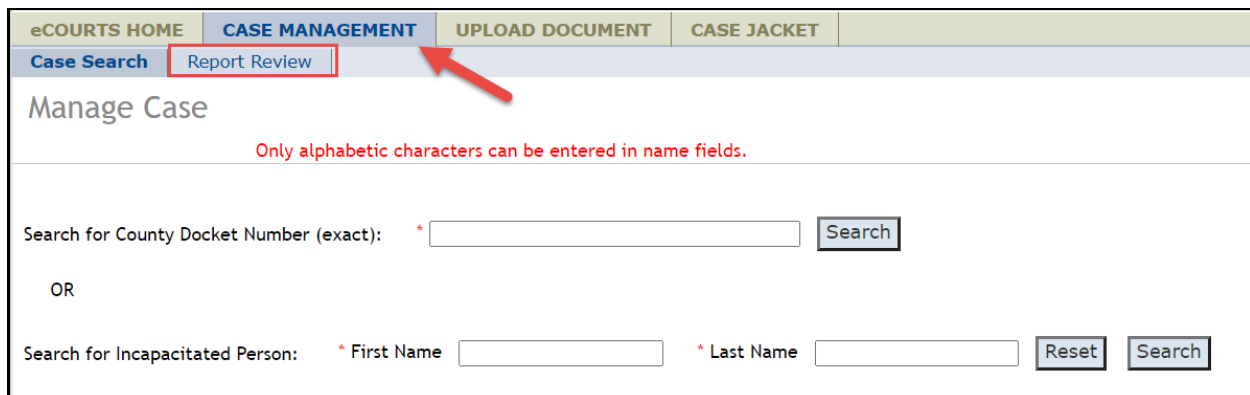
Additional functionality has been added within eCourts Guardianship Report Review. Finance Review, Final Review and Judge Review are now complete in the Case Review tab. Users will now be able to:

- 1) track the advancement of a report through Report Review based on review status
- 2) examine reports and record review results inside the application and eliminating much of the previously required paper processes.

Users with various levels of responsibility will now complete independent assessments until the review process for a report is either completed, or unless and until the review is sent to a Follow-Ups workbasket for more detailed actions (details regarding this new workbasket are within).

**NOTE:** Your county GMP Program Coordinator and/or AOC Civil Practice will be in contact to determine what access is appropriate for existing and new users.

The Report Review tab is located in the Case Management tab:



The screenshot displays the eCourts Case Management interface. At the top, there is a navigation bar with tabs: 'eCOURTS HOME', 'CASE MANAGEMENT', 'UPLOAD DOCUMENT', and 'CASE JACKET'. Below this, a sub-navigation bar contains 'Case Search' and 'Report Review'. The 'Report Review' tab is highlighted with a red box, and a red arrow points to it from the right. The main content area is titled 'Manage Case' and includes a red warning message: 'Only alphabetic characters can be entered in name fields.' Below this, there are two search options. The first is 'Search for County Docket Number (exact):' followed by a text input field and a 'Search' button. Below this is the word 'OR'. The second search option is 'Search for Incapacitated Person:' followed by two text input fields labeled '\* First Name' and '\* Last Name', a 'Reset' button, and a 'Search' button.

Finance, Final and Judge/Judge Delegate reviewers work in the Case Review workbasket:

Filed Date	County	Docket Number	Report type	Current Net Estate Value	Status	Attention
4/23/2020	Mercer	11-2020	Inventory	735,000	Pending Finance Review	Returned <input type="button" value="Begin"/>
6/4/2021	Mercer	MER-349-39392	Inventory	91,000	Pending Finance Review	Returned <input type="button" value="Begin"/>
8/17/2018	Mercer	MER-12345	Inventory		Pending Final Review	Returned <input type="button" value="Begin"/>
11/18/2020	Mercer	P-12377	Comprehensive Accounting	8,000	Pending Final Review	Returned <input type="button" value="Begin"/>
6/3/2021	Mercer	MER-349-39392	EZ Accounting	91,000	Pending Final Review	Returned <input type="button" value="Begin"/>
6/3/2021	Mercer	MER 209-1029	EZ Accounting	3,534	Pending Final Review	Returned <input type="button" value="Begin"/>
6/4/2021	Mercer	MER2017-15	Annual Report	9,000	Pending Final Review	Returned <input type="button" value="Begin"/>
4/3/2019	Mercer	19-02311	Inventory	89,000	Follow Ups In Progress	Emergent <input type="button" value="Review"/>
1/1/2019	Mercer	20-456	Inventory	130,000	Pending Final Review	<input type="button" value="Begin"/>
1/24/2019	Mercer	123-19	Annual Report	4,545	Pending Final Review	<input type="button" value="Begin"/>

Access:

- Is based on county/vicinage
- All users from the same county/vicinage see the same cases
- The workbasket is not individualized

For specific guidance on Finance, Final and Judge review functionality please refer to the Quick Reference Guides (QRGs) located at:

<https://intranet.njcourts.gov/adminoffices/atcsu/?d=Guardianship#eCourts>

**ATCSU Manuals**

Civil Criminal **eCourts** Family

Division:

**Title**

**Guardianship - Quick Reference Guide**

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## Follow-Ups Workbasket

A new workbasket has been added to Report Review. 'Follow-Ups' contains reviews that have follow-up actions to be addressed. This occurs when issues have been identified in the review process and it has been determined that follow-up actions are required to address the identified issues.

The screenshot shows a web interface for the 'Follow-Ups' workbasket. At the top, there are tabs for 'New Report Review', 'Case Review', and 'Follow-Ups'. Below the tabs is a search bar with 'Search by:' and options for '+ Add/Change' and 'Reset All'. A 'Refresh' button is also present. On the right, there is a pagination control showing 'Page 1 of 6'. Below the search bar is a table with columns: 'Filed Date', 'County', 'Docket Number', 'Report type', 'Current Net Estate Value', 'Status', and 'Attention'. The first row of data shows '3/2/2016', 'Camden', '123490', 'Annual Report', and 'Pending Follow-Ups'. A 'Review' button is located to the right of the 'Pending Follow-Ups' status.

Clicking 'Review' will open the review in *read-only* format. No actions can be taken in this workbasket, pending the roll-out of future functionality.

The screenshot shows the 'Judge Review Results' page. At the top, there are tabs for 'Judge Review', 'Finance Review', and 'New Report Review'. The main content area is titled 'Judge Review Results' and contains a list of questions and their answers. The first question is '1. Is the reporting period correct?' with the answer 'Yes'. The second question is '2. Is the correct reporting form used?' with the answer 'No'. Below the questions, there is a section for 'Emergent?' with the answer 'No'. There are two columns: 'Issue List' and 'Comment/Explanation'. The 'Issue List' contains 'Wrong form used' and 'Follow Up List'. The 'Comment/Explanation' contains 'Provide guardian with the correct form.' The 'Follow Up List' section is highlighted with a red box and contains the text 'Provide information or assistance to guardian(s)'.

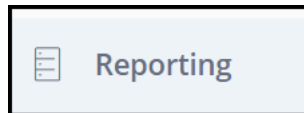
**NOTE:** Access to this workbasket will be limited to those users designated to complete follow-up action assignments. This will vary by county/vicinage.

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## Metric Report

A new metric report, Count of Completed Reviews, has been added to the Reporting link in Report Review. This report provides a list of reports completed based on the level of review.

**NOTE:** The reports are utilized primarily by Program Coordinators and AOC Civil Practice. Please contact your Program Coordinator regarding use of reports.



To utilize the report:

- 1) Enter the date range the report(s) were completed
- 2) Select the last level of review completed
- 3) Select the county/counties

Count of Completed Reviews Actions >

Generated on June 24, 2021 15:51:16

Review Completed Date from \*  1

Review Completed Date to \*

Status \* 3

Select... 2

- Select...
- New Report Review
- Finance Review
- Judge Review
- Final Review
- Review Complete

Counties \*  Count

For example, to locate all reviews completed from 6/17/21 – 6/25/21 in all counties:

Count of Completed Reviews Actions > X

Generated on June 24, 2021 15:51:16

Review Completed Date from \*

Review Completed Date to \*

Status \* 3

Review Complete

Counties \*

Atlantic X Bergen X Burlington X Camden X Cape May X Cumberland X  
Essex X Gloucester X Hudson X Hunterdon X Mercer X Middlesex X  
Monmouth X Morris X Ocean X Passaic X Salem X Somerset X  
Sussex X Union X Warren X

Apply filters Clear filters

Results:

- 1) All results display
- 2) Results display by report type
- 3) Results also display by county and report type

County Name	Annual Report	Comprehensive Accounting	EZ Accounting	Inventory	Count
ALL	3	3	2	4	12
Cape May				1	1
Gloucester		1			1
Hudson	1			1	2
Mercer	1	2	1	1	5
Ocean	1			1	2
Warren			1		1

**Drill-Down results:**

Clicking a case opens a read-only view of the review

Clicking 'Count of Completed Reviews' returns the user to the search page

Case Details Drill Down Actions >

Generated on: June 24, 2021 16:04:42

[Count of Completed Reviews](#) > Comprehensive Accounting

Displaying 3 records

Filed Date	County	Docket Number	Report type	Transaction ID	Current Review Status	Review Completed Date	Review Completed By
08/08/2018	Gloucester	GLO-145678	Comprehensive Accounting	GMP2018497	Resolved-Completed	06/17/2021	eric.dawson
03/10/2021	Mercer	21-0234	Comprehensive Accounting	GMP20213021	Resolved-Completed	06/17/2021	susan.flynn
05/30/2021	Mercer	19-02311	Comprehensive Accounting	GMP20213015	Resolved-Completed	06/22/2021	srinivas.jaggannagar

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# eCourts Guardianship – Civil Release

## Notes

03/19/2021

### Case Management

Fixed

Cases previously displaying with a blank Case Management screen have been fixed and display fully. For more information, click [here](#).

### Case Jacket

Enhanced

Case Jacket has been enhanced to include the IP Attorney information on a separate tab and in the Summary Report. For more information, click [here](#).

## Case Management

A fix has been made so that the cases that were displaying as blank in Case Management now display properly.

Prior to fix:

The screenshot shows the 'New Jersey Courts' logo and navigation tabs: eCOURTS HOME, CASE MANAGEMENT (selected), UPLOAD DOCUMENT, and CASE JACKET. Below the tabs are links for Case Search and Report Review. The main heading is 'Manage Case'. A red error message with a star icon states: 'Attorney and Firm details are not associated with this docket number.' Below this is a table with the following rows:

▶ Case Details	County Docket No.:	<a href="#">View Case Jacket</a>
▶ Judgment		
▶ Estate Value	Initial Estate Value: \$	Current Net Estate Value: \$
▶ Incapacitated Person (IP) Profile		STATUS: ACTIVE
▶ IP Attorney Profile		STATUS:
▶ Case Action		

At the bottom left, there is a 'Guardian +' link. At the bottom right, there is a 'Find New Case' button.

After fix:

The screenshot shows the same interface as above, but with data populated. The error message is gone. The table now contains the following rows:

▶ Case Details	County Docket No.: 18-200	<a href="#">View Case Jacket</a>
▶ Judgment	11/09/2018	
▶ Estate Value	Initial Estate Value: \$	Current Net Estate Value: \$
▶ Incapacitated Person (IP) Profile	DYLAN DUTCH	STATUS: ACTIVE
▶ IP Attorney Profile	DAVID MIDDLENAME PUTTY	STATUS: ACTIVE
▶ Guardian Profile	CHARLES SIMPKINS	Appointment Date: STATUS: ACTIVE
▶ Case Action		

The 'Guardian +' link and 'Find New Case' button remain at the bottom.

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## Case Jacket Addition of IP Attorney


Enhancements have been made to the Case Jacket:

- 1) The "Other(s)" tab has been renamed "Guardians";
- 2) An 'Attorney' tab containing the IP Attorney profile information from Case Management has been added to Case Jacket; and
- 3) IP Attorney profile information has also been added to the Summary Report.

**NOTE:** The Case Jacket information will update if changes are made to the IP Attorney Profile in Case Management.

To view basic information, click the 'Attorney' tab:

CASE JACKET		User:			
Docket Number: 2020-1007					
<a href="#">Back</a>		<a href="#">Create Summary Report</a>			
IP Name: CARMEN CAINE Filed Date: 10/20/2020 Guardianship Type: PERSON GENERAL(PLENARY) - ESTATE GENERAL(PLENARY)	Venue: WARREN Case Status: ACTIVE Judgment Date: 01/01/2021	Court Type: GUARDIANSHIP Case Type: Judge: HON. ROBERT P. CONTILLO, P.J.CH.			
IP	Guardians (2)	Attorney			
<table border="1"> <tr> <td>PHOEBE CHRISTIAN BENTLEY</td> <td>Party Type: IP Attorney</td> <td>Party Status: ACTIVE</td> </tr> </table>			PHOEBE CHRISTIAN BENTLEY	Party Type: IP Attorney	Party Status: ACTIVE
PHOEBE CHRISTIAN BENTLEY	Party Type: IP Attorney	Party Status: ACTIVE			

To view detailed attorney information, click the 

CASE JACKET		User:susan.flynn			
Docket Number: 2020-1007					
<a href="#">Back</a>		<a href="#">Create Summary Report</a>			
IP Name: CARMEN CAINE Filed Date: 10/20/2020 Guardianship Type: PERSON GENERAL(PLENARY) - ESTATE GENERAL(PLENARY)	Venue: WARREN Case Status: ACTIVE Judgment Date: 01/01/2021	Court Type: GUARDIANSHIP Case Type: Judge: HON. ROBERT P. CONTILLO, P.J.CH.			
IP	Guardians (2)	Attorney			
<table border="1"> <tr> <td>▼ PHOEBE CHRISTIAN BENTLEY</td> <td>Party Type: IP Attorney</td> <td>Party Status: ACTIVE</td> </tr> </table>			▼ PHOEBE CHRISTIAN BENTLEY	Party Type: IP Attorney	Party Status: ACTIVE
▼ PHOEBE CHRISTIAN BENTLEY	Party Type: IP Attorney	Party Status: ACTIVE			
Attorney First Name: PHOEBE Attorney Bar ID: 007412003 Address Line 1: 40 PARK PLACE Address Line 2: QA CAMS	Attorney Middle Name: CHRISTIAN Good Standing Status: ACTIVE City: NEWTON State: NJ Zip: 07860	Attorney Last Name: BENTLEY IP Attorney Firm: HOLLANDER, STRELZIK, PASCULLI, ET AL Email # 1: Email # 2: Phone # 1: Phone # 2:			

To view the Summary Report, click 'Create Summary Report':

<b>GMS Case Summary</b>				
<b>Docket Number:</b> 2020-1007				
<b>IP Name:</b> CARMEN CAINE		<b>Venue:</b> WARREN		<b>Court Type:</b> Guardianship
<b>Filed Date:</b> 10/20/2020		<b>Case Status:</b> ACTIVE		<b>Case Type:</b>
<b>Guardianship Type:</b> PERSON GENERAL(PLENARY) - ESTATE GENERAL(PLENARY)		<b>Judgment Date:</b> 01/01/2021		<b>Judge:</b> HON. ROBERT P. CONTILLO, P.J.CH.
<b>Incapacitated Person</b>				
<b>IP:</b> CARMEN CAINE		<b>Party Type :</b> INCAPACITATED PERSON		<b>Party Status :</b> ACTIVE
<b>Address Line 1:</b> ABBY ROAD		<b>City:</b> BEARTOWN		<b>Email #1:</b>
<b>Address Line 2:</b>		<b>State:</b> NJ		<b>Email #2:</b>
		<b>Zip:</b> 33333		<b>Phone #1:</b>
				<b>Phone #2:</b>
<b>Guardians(2)</b>				
<b>Guardian:</b> MARTHA MAINE		<b>Party Type :</b> GUARDIAN OF PERSON AND ESTATE		<b>Party Status :</b> ACTIVE
<b>Address Line 1:</b> COURT DRIVE		<b>City:</b> TRENTON		<b>Email #1:</b>
<b>Address Line 2:</b>		<b>State:</b> NJ		<b>Email #2:</b>
		<b>Zip:</b> 99999		<b>Phone #1:</b>
				<b>Phone #2:</b>
<b>Guardian:</b> NEW INSTITUTION		<b>Party Type :</b> GUARDIAN OF PERSON AND ESTATE		<b>Party Status :</b> ACTIVE
<b>Address Line 1:</b> 123 SOME PLACE		<b>City:</b> SOMERVILLE		<b>Email #1:</b>
<b>Address Line 2:</b>		<b>State:</b> NJ		<b>Email #2:</b>
		<b>Zip:</b> 08745-0000		<b>Phone #1:</b>
				<b>Phone #2:</b>
<b>Attorney</b>				
<b>Name:</b> PHOEBE CHRISTIAN BENTLEY		<b>Party Type:</b> IP Attorney		<b>Party Status:</b> ACTIVE
<b>Attorney Bar ID:</b> 007412003		<b>Good Standing Status:</b> ACTIVE		<b>IP Attorney Firm:</b> HOLLANDER, STRELZIK, PASCULLI, ET AL
<b>Address Line 1:</b> 40 PARK PLACE		<b>City:</b> NEWTON		<b>Email #1:</b>
<b>Address Line 2:</b> QA CAMS		<b>State:</b> NJ		<b>Email #2:</b>
		<b>Zip:</b> 07860		<b>Phone #1:</b>
				<b>Phone #2:</b>
<b>Case Actions</b>				
Filing Date	Docket Text	Transaction ID	Entry Date	Entered By
10/20/2020	Case Initiation Documents	GMP2021171	01/13/2021	susan.flynn
01/01/2021	Judgment	GMP2021287	02/02/2021	susan.flynn
01/05/2021	SS Representative Payee Report	GMP2021172	01/13/2021	susan.flynn
01/05/2021	Report Review - New Report Review RE: Inventory	GMP2021242	01/22/2021	susan.flynn
01/05/2021	Inventory Report	GMP2021173	01/13/2021	susan.flynn
02/19/2021	Overdue Notice: NEW INSTITUTION - Qualification Not Completed	GMP2021543	02/19/2021	System-Generated
03/05/2021	Overdue Notice: MARTHA MAINE - Qualification Not Completed	GMP2021676	03/05/2021	System-Generated



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# eCourts Guardianship – Civil Release


## Notes

02/26/2021

### Case Management

	The format and display of the calendar icon fields has been fixed. For more information, click <a href="#">here</a> .
	The “Last Modified By” column in the Removed Reports table in the Estate Value section has been fixed so that a user name will appear when a modification has been made. For more information, click <a href="#">here</a> .

### Upload Documents

	Users will no longer need to click the “Choose File” button twice in order to upload documents. For more information, click <a href="#">here</a> .
---	--

## Calendar Icons

The calendar icons now display properly in Chrome and Edge.

Prior display:

Initial Complaint and Judgment Details

Back

**!** Please verify the docket number for accuracy. Once submitted, the docket number cannot be modified.

\* County: MERCER \* County Docket Number: 30-2019 \* Verified Complaint Filed Date: 09/18/2019

▼ Judgment

\* Comprehensive Accounting?:  Yes  No

\* Bond Required?:  Yes  No \* Initial Bond \$: 45,000

\* Amended Bond?:  Yes  No

Date of Bond: 05/04/2020

Bond Company: AAA

Current display:

Initial Complaint and Judgment Details

Back

**!** Please verify the docket number for accuracy. Once submitted, the docket number cannot be modified.

\* County: WARREN \* County Docket Number: \* Verified Complaint Filed Date:

\* Bond Required?:  Yes  No \* Initial Bond \$: 56,000

\* Amended Bond?:  Yes  No

Date of Bond: 02/24/2021

Bond Company: ABC

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## Estate Value Table Fix

The "Last Modified By" column in the Removed Reports table in the Estate Value section has been fixed so that user names will display when a modification is made. The system messages will no longer appear in the column.

Prior to fix:

Date	Report Type	Transaction ID	Event Description	last Modified By	Modified Date
01/21/2021	Annual Report	GMP20214810	Wrong Report Type	Pega Utility njcts-njcc-prod1	01/25/2021 10:41:31 AM

After fix:

Date	Report Type	Transaction ID	Event Description	last Modified By	Modified Date
02/01/2021	EZ Accounting Report	GMP2021490	Uploaded to Wrong Case	susan.flynn	02/25/2021 11:37:46 AM

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## Upload Documents

When uploading documents, users will no longer need to click "Choose File" twice in order to upload a document.

eCOURTS HOME	CASE MANAGEMENT	UPLOAD DOCUMENT	CASE JACKET	User:
Upload Documents				
<a href="#">Back</a>				
▼ Case Details		County Docket No.: 2020-1007		<a href="#">View Case Jacket</a>
Documents Due:				
Documents listed below are either missing or overdue, and therefore need to be uploaded.				
• Qualification Documents from Guardian NEW INSTITUTION				
Select Document Type				
* Document Type: Well-Being Report	* Filed Date: 02/10/2021	* Guardian(s): NEW INSTITUTION	<a href="#">Choose File</a> No file chosen	
				<a href="#">Back</a> <a href="#">Continue</a>




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# eCourts Guardianship – Civil Release


## Notes

01/29/2021

### Case Management


 <p>Enhanced</p>	<p>The Estate Value table has been enhanced to include additional columns for ease of reference. Program Coordinators have the ability to make updates to report level estate values in Case Management. For more information, click <a href="#">here</a>.</p>
 <p>Enhanced</p>	<p>A "Removed Report" table has been added to the Estate Value section for reports administratively closed in Report Review. For more information, click <a href="#">here</a>.</p>
 <p>Fixed</p>	<p>The format of the search results in the guardian profile has been fixed. For more information, click <a href="#">here</a>.</p>


### Upload Documents

 <p>Fixed</p>	<p>Reports uploaded to cases with "- -" in the Initial Estate Value field in Case Management will immediately display in Report Review. For more information, click <a href="#">here</a>.</p>
--	---

## Estate Value Table Enhancements

The Estate Value table has been enhanced to include additional columns. For Program Coordinators, there is also an edit feature.

- 1) Date = date the report was filed with the Surrogate's Office
- 2) Estate Value = value reported by the guardian in the specific report and entered in the estate value field at upload
- 3) % Change = the percentage the estate value changed from the immediately prior report. If the estate value has gone **down**, the % Change displays in **red**
- 4) Transaction ID = the Transaction ID assigned to the report at upload. This ID never changes and is unique for each report
- 5) Action = report type
- 6) Last Modified By = last person who impacted the report by uploading it or editing the estate value
- 7) Modified = if the estate value has been changed, an icon  displays in the column and the history of the estate value changes displays when the icon is clicked

▼ Estate Value						
Initial Estate Value: \$ 601			Current Net Estate Value: \$ 750			
Initial Estate Value: <input type="text" value="601"/>						
1	2	3	4	5	6	7
Date	Estate Value	% Change	Transaction ID	Action	Last Modified By	Modified
01/06/2021	\$750	24.79	GMP2021254	EZ Accounting Report	susan.flynn	
01/06/2021	\$601	100	GMP2021253	Inventory Report	susan.flynn	
09/16/2020	\$0	N/A	GMP2021252	Case Initiation Documents	susan.flynn	

Removed Reports					
Date	Report Type	Transaction ID	Event Description	last Modified By	Modified Date
01/13/2021	EZ Accounting Report	GMP2021255	Uploaded to Wrong Case	susan.flynn	01/28/2021 03:40:49 PM



Clicking the ⓘ opens a pop-up containing the edit history of the estate value for that particular report showing who performed the edit(s), the original value as well as the update(s) and the date and time for each edit. Clicking 'Close' closes the window.

Date	Estate Value	% Change	Transaction ID	Action	Last Modified By	Modified
01/13/2021	\$770	28.12	GMP2021255	EZ Accounting Report	susan.flynn	ⓘ

Performed By	Estate value	Modified Date
susan.flynn	\$750	01/28/2021 03:42:49 PM
susan.flynn	\$506	01/27/2021 11:07:17 AM
susan.flynn	\$0	01/27/2021 09:08:35 AM

Close

**NOTE:** Updates made to estate value in Report Review will display in the Estate Value table and will show as a modification.

**Program Coordinator Only View** includes the 7 columns discussed above plus:

8) An edit feature to update an estate value in Case Management

▼ Estate Value		Initial Estate Value: \$ 601			Current Net Estate Value: \$ 506		
		Initial Estate Value: <input type="text" value="601"/>					
1	2	3	4	5	6	7	8
Date	Estate Value	% Change	Transaction ID	Action	Last Modified By	Modified	Edit
01/06/2021	\$506	15.81	GMP2021254	EZ Accounting Report	susan.flynn		
01/06/2021	\$601	100	GMP2021253	Inventory Report	susan.flynn		
09/16/2020	\$0	N/A	GMP2021252	Case Initiation Documents	susan.flynn		

Click the icon to edit an estate value, then click 'Save'. Clicking 'Cancel' will close the edit feature. The same value may be updated more than once.

Date	Estate Value	% Change	Transaction ID	Action	Last Modified By	Modified	Edit
01/06/2021	\$750	24.79	GMP2021254	EZ Accounting Report	susan.flynn		
01/06/2021	\$601	100	GMP2021253	Inventory Report	susan.flynn		
09/16/2020	<input type="text" value="\$ 0"/>	N/A	GMP2021252	Case Initiation Documents	susan.flynn		<input type="button" value="Save"/> <input type="button" value="Cancel"/>

**NOTE:** Updates made in Case Management display in Report Review.

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## Removed Reports

A 'Removed Reports' table has been added to display any reports that have been closed using the administrative close function in Report Review. A report displays in this table only if it was admin closed for one of three reasons: 1) Duplicate; 2) Uploaded to Wrong Case; 3) Uploaded under the Wrong Report Type. This section is informational only.

**NOTE:** The 'Removed Reports' section *only* displays if a report has been admin closed.

▼ Estate Value		Initial Estate Value: \$ 601		Current Net Estate Value: \$ 750		
Initial Estate Value: <input type="text" value="601"/>						
<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>
Date	Estate Value	% Change	Transaction ID	Action	Last Modified By	Modified
01/06/2021	\$750	24.79	GMP2021254	EZ Accounting Report	susan.flynn	
01/06/2021	\$601	100	GMP2021253	Inventory Report	susan.flynn	
09/16/2020	\$0	N/A	GMP2021252	Case Initiation Documents	susan.flynn	
<b>Removed Reports</b>						
Date	Report Type	Transaction ID	Event Description	last Modified By	Modified Date	
01/13/2021	EZ Accounting Report	GMP2021255	Uploaded to Wrong Case	susan.flynn	01/28/2021 03:40:49 PM	

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## Guardian Search Results

The search results display properly when many pages of results are returned:

▼ Guardian Profile

\* Search By:  \* Guardian First Name:  \* Guardian Last Name:

**Search Results** Only select 'Add New Guardian' if the guardian profile does not exist in the system. To add a guardian with an existing profile, select the radio button next to the guardian's name and click Continue.

First << 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 >> Last

Select	Party Name : 0	Address	Phone 1	DOB
<input type="radio"/>	martha maine	Court Drive Trenton NJ 99999		
<input type="radio"/>	Madan K Mallampati JR <a href="#">Alias</a>	1708 EDISON APT 101 MONMOUTH JUNCTION NJ 08852		
<input type="radio"/>	Madan K Mallampati JR <a href="#">Alias</a>	1708 EDISON APT 101 MONMOUTH JUNCTION NJ 08852		
<input type="radio"/>	Madan Mallampati JR <a href="#">Alias</a>	1708 EDISON APT 101 MONMOUTH JUNCTION NJ 08852		
<input type="radio"/>	Madan K Mallampati JR <a href="#">Alias</a>	1708 EDISON APT 101 MONMOUTH JUNCTION NJ 08852		
<input type="radio"/>	Madan K Mallampati JR <a href="#">Alias</a>	1708 EDISON APT 101 MONMOUTH JUNCTION NJ 08852		
<input type="radio"/>	Madan K Mallampati JR <a href="#">Alias</a>	1708 EDISON APT 101 MONMOUTH JUNCTION NJ 08852		
<input type="radio"/>	Madan K Mallampati JR <a href="#">Alias</a>	1708 EDISON APT 101 MONMOUTH JUNCTION NJ 08852		
<input type="radio"/>	Madan K Mallampati JR <a href="#">Alias</a>	1708 EDISON APT 101 MONMOUTH JUNCTION NJ 08852		
<input type="radio"/>	Madan K Mallampati JR <a href="#">Alias</a>	1708 EDISON APT 101 MONMOUTH JUNCTION NJ 08852		

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## Upload Documents – Reports

When an Inventory, EZ Accounting, Comprehensive Accounting or Annual Report is uploaded on a case that has dashes (“- -”) in the Initial Estate Value field in the Estate Value table, it will immediately display in Report Review. Prior to the fix, these reports experienced an overnight delay before displaying in Report Review.

Legacy Guardianship Monitoring System (GMS) case: Review latest judgment(s) to verify and/or update reporting requirements below.			
▼ Case Details	County Docket No.: cp-0200-2017		<a href="#">View Case Jacket</a>
County: ESSEX	Status: ACTIVE	Date Filed: 05/17/2017	
▶ Judgment	06/14/2017		
▶ Estate Value	Initial Estate Value: \$ --	Current Net Estate Value: \$ 54,300	
▶ Incapacitated Person (IP) Profile	JEAN GUY BEAUVOIR	STATUS: ACTIVE	
▶ IP Attorney Profile	PHOEBE CHRISTIAN BENTLEY	STATUS: INACTIVE	
▶ Guardian Profile	ANNIE GAMACHE	Appointment Date:	STATUS: ACTIVE
▶ Case Action			



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# eCourts Guardianship – Civil Release


## Notes

12/18/2020

### Case Jacket

	Chrome and Edge users will no longer receive an error message when 'Create Summary Report' is clicked in Case Jacket, and JavaScript no longer displays in the Summary Report. For more information, click <a href="#">here</a> .
	Edge users can open Report Review summaries in the Case Jacket. For more information, click <a href="#">here</a> .

### Upload Documents

	Chrome users will no longer receive an error when 'View/Print' is clicked in Upload Document after a document is uploaded to the Case Jacket. For more information, click <a href="#">here</a> .
---	--

## Create Summary Report

When users select 'Create Summary Report' in Case Jacket, the report will display with no error messages, and the report will no longer contain javascript.

CASE JACKET					User:
Docket Number: MER2017-10					
Back		Create Summary Report			
IP Name: LILLIAN LEEDS Filed Date: 02/01/2017 Guardianship Type: PERSON GENERAL(PLENARY)		Venue: MERCER Case Status: ACTIVE Judgment Date: 02/01/2017		Court Type: GUARDIANSHIP Case Type: Judge: HON. THOMAS L. WEISENBECK, A.J.S.C.	
IP Others (2)					
LILLIAN LEEDS		Party Type: INCAPACITATED PERSON		Party Status :ACTIVE	
Case Actions					
Search:					
Filing Date	Filings	Docket Text	Transaction ID	Entry Date	Entered By
02/01/2017		Case Initiation Filings	GMP2017146	04/05/2017	gmstest4
03/29/2017		Verified Complaint	GMP2017153	04/05/2017	gmstest4

Prior behavior:

Case Actions					
Filing Date	Docket Text	Transaction ID	Entry Date	Entered By	
05/04/2010	Report Review - New Report Review RE: Inventory <a href=javascript:void(0); onclick=openDocPopUp('GM','WRN','2589','11','GMP','2020','281','false');return false;]>[GMP2020281]</a>	GMP202020047	10/29/2020	susan.flynn	
05/04/2010	Report Review - New Report Review RE: Inventory <a href=javascript:void(0); onclick=openDocPopUp('GM','WRN','2589','11','GMP','2020','281','false');return false;]>[GMP2020281]</a>	GMP20202862	05/13/2020	susan.flynn	
05/04/2010	Inventory Report	GMP2020281	02/07/2020	sudeepthi.vasamsetti	
02/08/2011	Case Initiation Documents	GMP2020246	02/04/2020	sudeepthi.vasamsetti	
02/05/2014	Inventory Report	GMP2020249	02/04/2020	sudeepthi.vasamsetti	
02/11/2014	Comprehensive Accounting Report	GMP2020250	02/04/2020	sudeepthi.vasamsetti	
02/11/2014	Report Review - New Report Review RE: Comprehensive Accounting <a href=javascript:void(0); onclick=openDocPopUp('GM','WRN','2589','11','GMP','2020','250','false');return false;]>[GMP2020250]</a>	GMP202019174	08/04/2020	susan.flynn	
06/17/2014	SS Representative Payee Report	GMP2020251	02/04/2020	sudeepthi.vasamsetti	

Current behavior:

Case Actions					
Filing Date	Docket Text	Transaction ID	Entry Date	Entered By	
02/01/2017	Case Initiation Filings	GMP2017146	04/05/2017	gmstest4	
03/29/2017	Verified Complaint	GMP2017153	04/05/2017	gmstest4	
03/30/2017	Qualification Documents	GMP2017154	04/05/2017	gmstest4	
03/31/2017	Qualification Documents	GMP2017149	04/05/2017	gmstest4	
04/05/2017	Inventory Report	GMP2017148	04/05/2017	gmstest4	
04/05/2017	Report Review - New Report Review RE: Inventory GMP2017148	GMP202018634	07/13/2020	shalini.agarwal	
03/02/2020	Overdue Notice	GMP2020524	03/02/2020	System-Generated	
07/29/2020	Overdue Notice: HENRY HILLS - Well-Being Report, Social Security Representative Payee Report, Comprehensive Accounting Report, EZ Accounting Report Not Filed	GMP202018728	07/29/2020	System-Generated	
07/29/2020	Overdue Notice: SALLY HILLS - Well-Being Report, Social Security Representative Payee Report, Comprehensive Accounting Report, EZ Accounting Report Not Filed	GMP202018729	07/29/2020	System-Generated	
12/01/2020	SS Representative Payee Report	GMP202020412	12/17/2020	susan.flynn	

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## Report Review Summaries

Edge users are now able to open Report Review summaries from Case Jacket. The summary will open in a new window as a PDF.

Prior behavior:

05/04/2020		Inventory Report			
05/04/2020		<b>EMERGENCY Report Review - New Report Review RE: Annual Report [GMP20201603]</b>			
05/04/2020		Report Review - New Report Review RE: Comprehensive Accounting [GMP20201604]			
05/04/2020		Report Review - New Report Review RE: Inventory [GMP20201602]			
05/04/2020		Annual Report			
05/04/2020		Comprehensive Accounting Report			
05/07/2020		EZ Accounting Report			
05/07/2020		Report Review - New Report Review RE: EZ Accounting [GMP20201603]	GMP202018650	07/16/2020	susan.flynn
05/12/2020		Overdue Notice	GMP20201716	05/12/2020	System-Generated

Current behavior:

04/05/2017		Inventory Report	GMP2017148	04/05/2017	gmstest4
04/05/2017		Report Review - New Report Review RE: Inventory [GMP2017148]	GMP202018634	07/13/2020	shalini.agarwal
03/02/2020		Overdue Notice	GMP2020524	03/02/2020	System-Generated

Guardian Report Review Summary - Adobe Acrobat Reader DC

File Edit View Sign Window Help

Home Tools Guardian Report Re... x

108%

CONFIDENTIAL (MER) mer2017-10 07/13/2020 03:00:21 PM Pg 1 of 1 Trans ID: GMP202018634

Independence • Integrity Fairness • Quality Service

### Guardian Report Review : New Report Review Summary

Docket Number:	mer2017-10	Initial Estate Value:	\$
IP Name:	Lillian Leeds	Current NEV:	\$ 1
Report Type:	Inventory	Bond Amount:	\$ 20,000
Judgment Date:	02/01/2017	Transaction ID:	GMP2017148
Filed Date:	04/05/2017	Summary Submitted:	07/13/2020

New Report Review Summary

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## Upload Documents - View/Print

When 'View/Print' is clicked in the Upload Documents tab after a document has been uploaded to Case Jacket, users will no longer receive an error message.

eCOURTS HOME	CASE MANAGEMENT	<b>UPLOAD DOCUMENT</b>	CASE JACKET	User:
Confirmation				
✔ Request processed successfully				
▼ Case Details		County Docket No.: mer2017-10		<a href="#">View Case Jacket</a>
County: MERCER		Status: ACTIVE		Date Filed: 02/01/2017
Transaction Information				
Documents	Filed Date	Date Submitted	Transaction ID	
Subsequent Order	12/08/2020	12/17/2020	GMP202020413	
				<input type="button" value="View/Print"/> <input type="button" value="Find New Case"/>

<b>Case Details</b>		County Docket No.: mer2017-10		
County: MERCER		Status: Active		Date Filed: 12/17/2020
<b>Transaction Information</b>				
Documents	Filed Date	Date Submitted	Transaction ID	
Subsequent Order	12/08/2020	12/17/2020	GMP202020413	

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# eCourts Guardianship Report Review – Civil Release Notes

12/18/2020

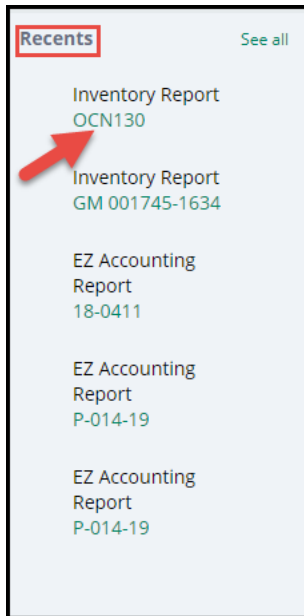
## Report Review

<b>Enhanced</b>	A Recents List has been added to the workbaskets, displaying the most recently opened reviews. For more information, click <a href="#">here</a> .
<b>Enhanced</b>	The error messages within the reviews are more user friendly. For more information, click <a href="#">here</a> .
<b>Enhanced</b>	The audit text when a report level estate value is updated now displays the original value and the updated value. For more information, click <a href="#">here</a> .
<b>Fixed</b>	The case details drill down screen label has been fixed to indicate when all results are displayed in Reporting. For more information, click <a href="#">here</a> .

## Recents List

The 'Recents' list will display the five most recently opened reviews on the left side of the workbasket. Recents is specific to user, and is available each time the user logs in in (it does not clear at the end of the session).

The docket numbers in the 'Recents' list are hyperlinks and will open a read-only version of the review when clicked. If the review is not in a status the user has access to, a message will display.



## Read only view:

Docket Number <b>OCN130</b>	IP Name <b>Alice Browne</b>	Report type <b>Inventory</b>	Status <b>Pending Final Review</b>
Judgment Date <b>10/15/2017</b>	Filed Date <b>04/11/2012</b>	Initial Estate Value <b>\$76</b>	Current Net Estate Value <b>\$23,232,323</b>
Bond Amount <b>---</b>	Transaction ID <b>GMP2000405</b>		

**Quick Links**  
Case Jacket | Inventory

---

**New Report Review Results**

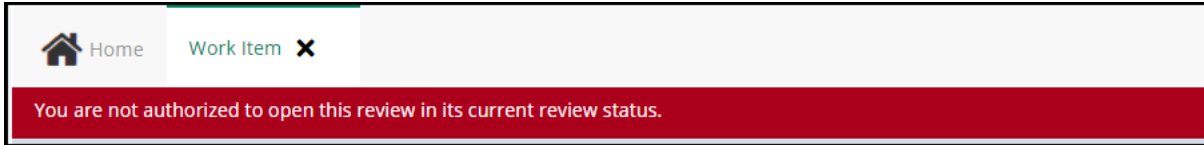
1. Is the reporting period correct?	Yes
2. Is the correct reporting form used?	Yes
3. Does the report contain all required information?	Yes
4. Is the information reported consistent with the income/assets/liabilities/encumbrances reported in the Certification of Asset?	Yes
5. Do the liabilities/encumbrances match the IP's condition and residential arrangement?	Yes
6. Based on the current estate value, is the bond amount appropriate?	Yes
7. Based on the current estate value and the guardian's relationship with the IP, are the guardian reporting requirements appropriate?	Yes
8. Based on this report, should the guardian's appointment be reviewed?	No
9. Are there other areas of concern?	No
10. Are there mathematical errors in the report?	No
11. Net Estate Value (NEV) for this report	\$4,700

---

**Certification of Information**

Yes, I certify that this report has been reviewed by me and acknowledge that there are no issues identified.

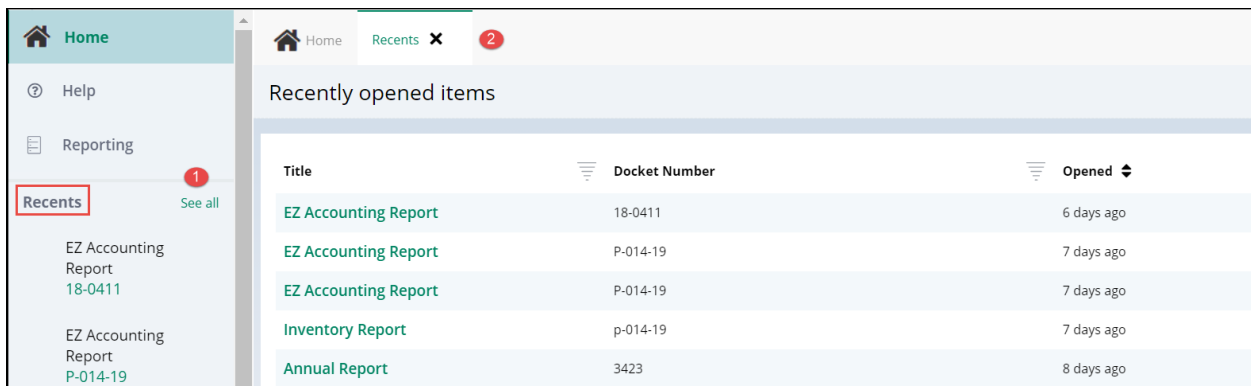
**Close**



If there are more than five (5) reviews that have been recently opened, they will be listed in 'See All':

- 1) Click 'See All'
- 2) The additional reviews open in a new tab

**NOTE:** the entire row in the 'See All' tab is a hyperlink.



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## Error Messages

The error messages within the reviews have been enhanced to be specific and display at the field level in red.

**Answer all questions below based on comparison to the Certification of Assets.**

1. Is the reporting period correct?

2. Is the correct reporting form used?

- Comments: Comments are required.

Emergent?

Issues

Wrong form used ✕ Clear

Comment/Explanation

*Comment/Explanation*

Remaining: 150 characters

✕ **Comments are required.**

7. Based on the current estate value and the guardian's relationship with the IP, are the guardian reporting requirements appropriate?  Yes  No

✕ **Response is required.**

11. Net Estate Value (NEV) for this report

-900 ? ✕ **Estate value should be a positive value**

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## Audit Text

When a user updates the net estate value field in a review, the audit text will display the update in a "from \$X to \$Y" format to preserve a record of the update.

When an estate value is updated from one value to another:

Audit <span>Draft Notes</span>		
Time	Description	Performed by
12/17/2020 12:18 PM	Net Estate Value updated from '\$1.00' to '\$4700'	susan.flynn

When a blank estate value field is updated:

Audit <span>Draft Notes</span>		
Time	Description	Performed by
12/17/2020 12:14 PM	Net Estate Value updated from '\$' to '\$800'	susan.flynn

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## Case Details Drill Down Screen

In 'Reporting', when 'All' is selected, the results display with the appropriate label to indicate that all results are listed.

- 1) Select 'Reporting'
- 2) Enter search criteria
- 3) Select 'All' from the results
- 4) The label accurately reflects that all results are displaying

Help

**Reporting** 1

Recents [See all](#)

- Inventory Report OCN130
- Inventory Report GM 001745-1634
- EZ Accounting Report 18-0411

Filed Date From

Review Status \* 2

Pending-New Report Rev... X

[Collapse all group heading](#)

County Name	Annual Report
ALL 3	10

### Case Details Drill Down

[Count By Report Type](#) (All Results) 4

Displaying 50 records




Filed Date	County	Docket Number	Full Name
3/3/2020	Bergen	12548754	Craig White

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# eCourts Guardianship Report Review – Civil Release Notes

12/04/2020

## Report Review

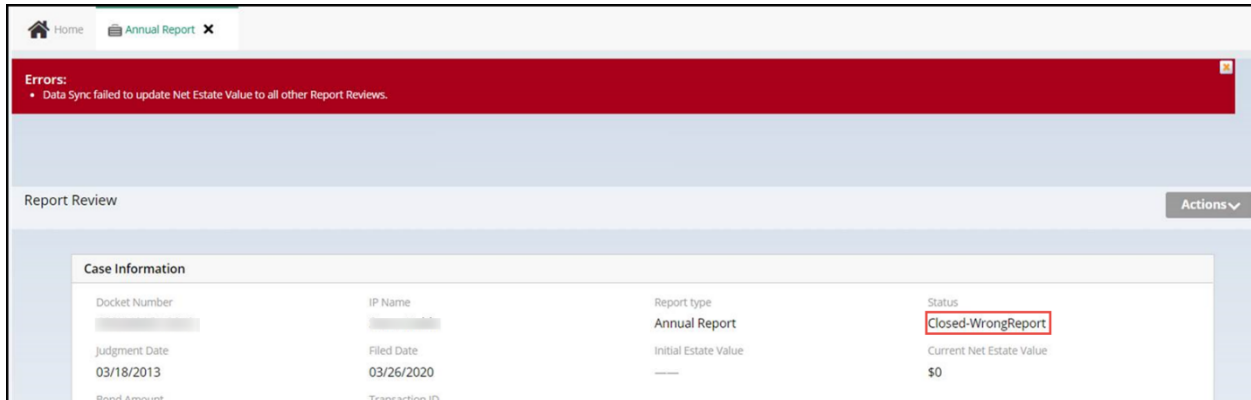
	Reports can be successfully administratively closed in Report Review using the “Wrong Report Type” reason. For more information, click <a href="#">here</a> .
	Blank lines have been removed from the Audit tab. For more information, click <a href="#">here</a> .
	The report level net estate value will be blank if the report was uploaded prior to the collection of the estate value at upload, instead of displaying the current net estate value. For more information, click <a href="#">here</a> .



## Admin Close

The Admin Close feature has been fixed so that users can close cases using “Wrong Report Type” as the reason. The error message (see below) will no longer display.

**NOTE:** Cases that displayed the error prior to the fix remain on the workbasket and must be closed.



The screenshot shows a web application interface. At the top, there is a navigation bar with a home icon and a tab labeled "Annual Report" with a close button. Below the navigation bar is a red error banner with the text "Errors: Data Sync failed to update Net Estate Value to all other Report Reviews." Below the error banner is a section titled "Report Review" with an "Actions" dropdown menu. Underneath is a "Case Information" table with the following data:

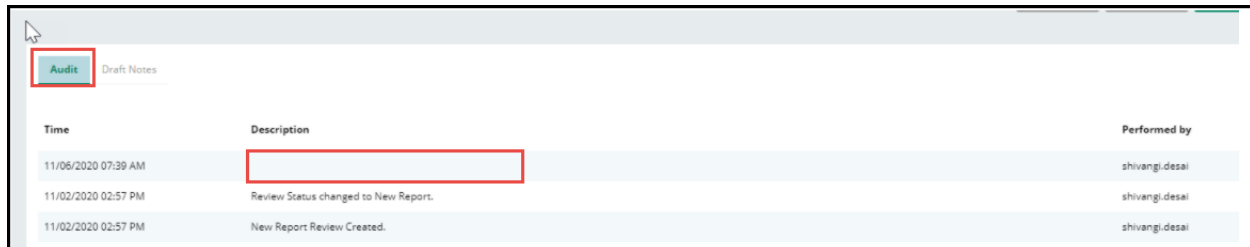
Docket Number	IP Name	Report type	Status
[REDACTED]	[REDACTED]	Annual Report	Closed-WrongReport
Judgment Date 03/18/2013	Filed Date 03/26/2020	Initial Estate Value ---	Current Net Estate Value \$0
Bond Amount	Transaction ID		

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## Audit Tab

The blank lines that previously displayed in the Audit tab have been removed.

**NOTE:** The blank lines were erroneously inserted as part of data sync and have been removed; no data or information has been lost.



Time	Description	Performed by
11/06/2020 07:39 AM		shivangi.desai
11/02/2020 02:57 PM	Review Status changed to New Report.	shivangi.desai
11/02/2020 02:57 PM	New Report Review Created.	shivangi.desai

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## Report Level Estate Values Have Been Corrected

The **report level net estate values (RNEV)** for cases in the New Report Review workbasket have been updated to blanks for reports uploaded prior to the collection of estate value at upload. Previously, reviews incorrectly displayed the current net estate value (CNEV) in the RNEV field.

**NOTE:** Cases in the Case Review workbasket are not impacted by this fix because the reports have been reviewed, and presumably the RNEVs have been updated as needed.

### Example:

- Report uploaded prior to 3/2020 when estate value field was added to the upload screen
- Previously, the review would display the CNEV in the RNEV field (#14 in the review)
- Now, the RNEV field will be blank in the New Report Review workbasket
- Users will enter the correct RNEV from the report

### Corrected display:

Case Information			
Docket Number	IP Name	Report type	Status
p-7777-2018	John Wells	EZ Accounting	New Report
Judgment Date	Filed Date	Initial Estate Value	Current Net Estate Value
08/22/2018	06/07/2017	\$8,000	\$5,000
Bond Amount	Transaction ID		
\$1,000	GMP20196049		
<b>Quick Links</b>			
<a href="#">Case Jacket</a>   <a href="#">EZ Accounting</a>			

Answer all questions below based on comparison to the Inventory or the prior year's reporting.

1. Is the reporting period correct?  Yes  No
2. Is the correct reporting form used?  Yes  No
3. Does the report contain all required information?  Yes  No
4. Do the income and disbursements appear accurate and consistent with the judgment, other orders, and any prior reports?  Yes  No
5. Do the disbursements match the IP's condition and residential arrangement?  Yes  No
6. Were any gifts or donations appropriate and consistent with the judgment, other orders, and any prior reports?  Yes  No
7. Were any fees, commissions, reimbursements or other payments to the guardian or other professionals appropriate and consistent with the judgment, other orders, and any prior reports?  Yes  No
8. Was any change in ownership of assets reported?  Yes  No
9. Based on the current estate value, is the bond amount appropriate?  Yes  No
10. Based on the current estate value and the guardian's relationship with the IP, are the guardian reporting requirements appropriate?  Yes  No
11. Based on this report, should the guardian's appointment be reviewed?  Yes  No
12. Are there other areas of concern?  Yes  No
13. Are there mathematical errors in the report?  Yes  No
14. Net Estate Value (NEV) for this report

**ALSO NOTE:** There is a known bug for certain cases that have the RNEV updated to \$0. Specifically, for cases with no estate values in the Estate Value table in Case Management, if the



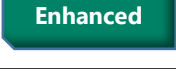

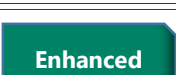


RNEV is updated to \$0 in Report Review, the Estate Value table is not being updated. This bug is in the process of being fixed.

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# eCourts Guardianship Report Review – Civil Release Notes

11/06/2020

## Report Review

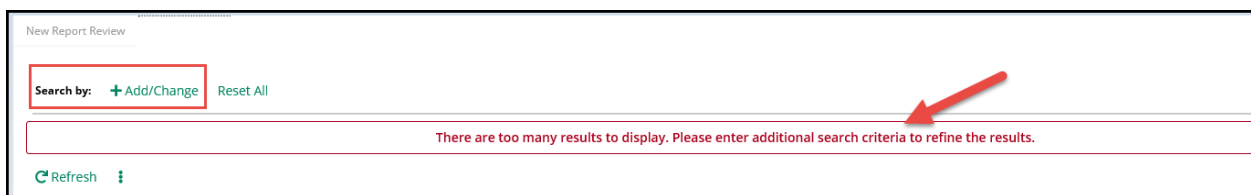
	<p>The workbaskets will only display up to 500 records. To locate a recent record not in the workbook, users must use the search function. For more information, click <a href="#">here</a>.</p>
	<p>The search function has been enhanced and the feature has been moved to the top of the workbook. For more information, click <a href="#">here</a>.</p>
	<p>The sort feature remains on the columns. 'Refresh' operates to clear the sort. For more information, click <a href="#">here</a>.</p>
	<p>The workbook columns have been updated to be more user friendly. For more information, click <a href="#">here</a>.</p>
	<p>The Quick Links feature includes a link to the report under review. For more information, click <a href="#">here</a>.</p>
	<p>All data is now synced so that updates will immediately display. For more information, click <a href="#">here</a>.</p>
	<p>A tool tip relating to the net estate value field has been added to the report review screen. For more information, click <a href="#">here</a>.</p>

## Workbasket Display

The workbasket will display up to 500 records based on Filed Date. A message has been added directing users to narrow the results by adding search criteria.

If there are fewer than 500 records in the workbasket, all records will display and this message will not appear.

**NOTE:** If the workbasket contains more than 500 records, the records with the most recent 'Filed Date' **must** be located via the search feature.



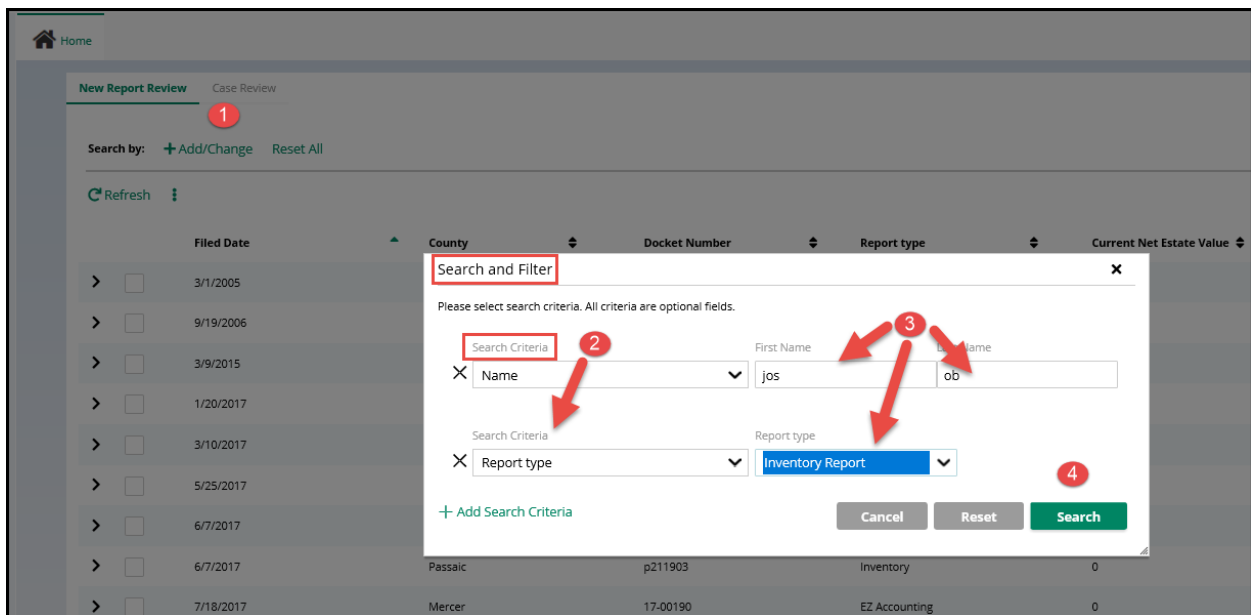
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## Search/Filter Enhancements

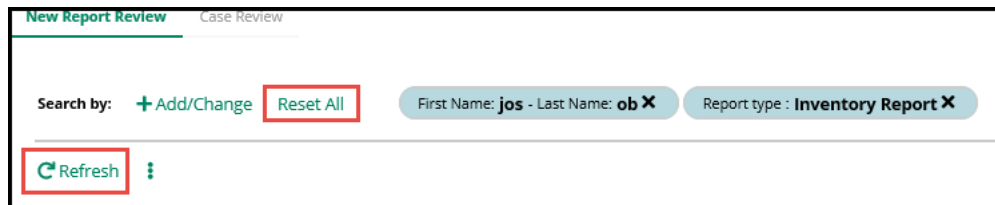
The Search/Filter features have been enhanced. The search feature is now located above the workbasket. The sort feature remains on the columns.

To use the search:

1. Click **+Add/Change**
2. Select the search criteria from the dropdown list
  - a. Click **+Add/Change** again to add more criteria
  - b. Users can search on criteria located in the expanded section, such as Bond
3. Complete any necessary fields
4. Click 'Search'




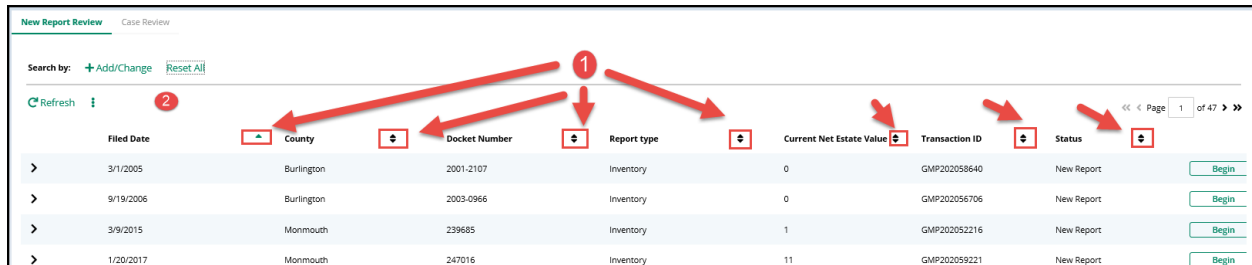
After clicking 'Search' the results display in the workbasket. To clear the search, click 'Reset All' or 'Refresh'.



**NOTE:** Searches will save until 'Reset All' or 'Refresh' is clicked.

The sort feature remains on the columns:

1. Click on the carot to sort
2. Click  Refresh to clear the sort(s)



Filed Date	County	Docket Number	Report type	Current Net Estate Value	Transaction ID	Status
> 3/1/2005	Burlington	2001-2107	Inventory	0	GMP202058640	New Report <a href="#">Begin</a>
> 9/19/2006	Burlington	2003-0966	Inventory	0	GMP202056706	New Report <a href="#">Begin</a>
> 3/9/2015	Monmouth	239685	Inventory	1	GMP202052216	New Report <a href="#">Begin</a>
> 1/20/2017	Monmouth	247016	Inventory	11	GMP202059221	New Report <a href="#">Begin</a>

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## Workbasket Columns Have Been Updated

The workbasket columns have been updated to be more user friendly and useful:

- Docket Number (instead of IP Name)
- Current Net Estate Value (instead of Bond)

New Report Review Case Review

Search by: + Add/Change Reset All

Refresh

Filed Date	County	Docket Number	Report type	Current Net Estate Value	Transaction ID	Status
3/1/2005	Burlington	2001-2107	Inventory	0	GMP202058640	New Report

**NOTE:** IP Name and Bond, as well as other fields, still display in the expanded section:

Filed Date	County	Docket Number	Report type	Current Net Estate Value	Transaction ID	Status
3/1/2005	Burlington	2001-2107	Inventory	0	GMP202058640	New Report
Docket Number 2001-2107						
Initial Estate Value \$0						
Name JOSPEH OBRIEN						
Bond						
Judgment Date 11/30/2001						
Transaction ID GMP202058640						

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## Quick Links Enhancement

The 'Quick Links' feature has been enhanced. Clicking the report type now opens the report under review in a new window.

The screenshot displays a web application interface. On the left, a sidebar contains a 'Report Review' section with a 'Case Information' box and a 'Quick Links' section. The 'Case Information' box lists: Docket Number 239685, Judgment Date 09/12/2014, and Bond Amount \$0. The 'Quick Links' section includes a link for 'Inventory'. A red arrow points from this link to a new browser window on the right. The browser window shows a document titled 'Guardianship Estate Inventory' from the Superior Court of New Jersey, Chancery Division - Probate Part, County of Monmouth. The document includes a 'Recapitulation' table with the following data:

Schedule	Description	Value
Schedule A	Real Property	\$0 none
Schedule B	Stocks, Bonds, Mutual Funds, Securities and Investment Accounts	\$0 none
Schedule C	Cash, Bank Accounts, Notes Due	\$0 0.72
Schedule D	Pensions, Retirement Accounts, Annuities, Profit Sharing Plans	\$0 none
Schedule E	Miscellaneous Personal Property	\$0 none
Gross Value	(Add Schedules A, B, C, D, and E)	\$0 none
Schedule F	Encumbrances	\$(0 none)

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## Data Is Now Up to Date and Synced

The information contained in the Case Information section is now up-to-date. Changes made in Case Management and Report Review will be reflected immediately.

### Examples:

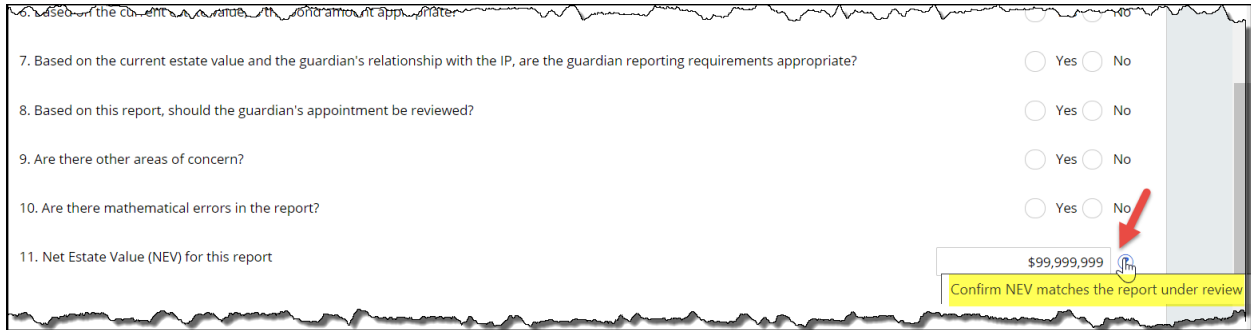
- If Bond is updated in Case Management, that change will be immediately reflected in Case Information in Report Review.
- If the Current Net Estate Value is updated in Report Review, that change will immediately reflect in Report Review and in the Estate Value section of Case Management.

Report Review			
Case Information			
Docket Number	IP Name	Report type	Status
union-10003	Artie Blank	Annual Report	New Report Draft
Judgment Date	Filed Date	Initial Estate Value	Current Net Estate Value
06/01/2017	02/14/2006	\$8,001	\$8,000
Bond Amount	Transaction ID		
\$10,000	GMP2020388		
<b>Quick Links</b>			
<a href="#">Case Jacket</a>   <a href="#">Annual Report</a>			

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## Updates to 'Net Estate Value (NEV) for this report'

A tool tip has been added to the Net Estate Value review question to remind users that the NEV entered in this question should match what is reported on the report under review.




The screenshot shows a review form with five questions. Questions 7, 8, 9, and 10 are multiple-choice questions with 'Yes' and 'No' radio buttons. Question 11 is a text input field for 'Net Estate Value (NEV) for this report' containing '\$99,999,999'. A red arrow points to the input field, and a yellow tooltip box appears below it with the text 'Confirm NEV matches the report under review'.

7. Based on the current estate value and the guardian's relationship with the IP, are the guardian reporting requirements appropriate?  Yes  No

8. Based on this report, should the guardian's appointment be reviewed?  Yes  No

9. Are there other areas of concern?  Yes  No

10. Are there mathematical errors in the report?  Yes  No

11. Net Estate Value (NEV) for this report  

Confirm NEV matches the report under review

**NOTE:** Updates made to the NEV field in report review will be reflected in the Case Information section of the reviews, as well as in the Estate Value section in Case Management as discussed above.

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# eCourts Guardianship – Civil Release

## Notes

11/06/2020

### Guardians – Case Management and Case Creation

<b>Enhanced</b>	Enhanced messaging and a tool tip added to clarify that if a guardian exists in the system, users should not click 'Add New Guardian'. For more information, click <a href="#">here</a> .
<b>Fixed</b>	The address in guardian search results now includes the State. For more information, click <a href="#">here</a> .
<b>Fixed</b>	The 'NJ Attorney ID' column has been removed from the guardian search results because this data was not collected. For more information, click <a href="#">here</a> .
<b>Fixed</b>	At least one active guardian must be associated with every case. For more information, click <a href="#">here</a> .

### Upload Documents

<b>Enhanced</b>	Upload size increased to 25MB for internal users. For more information, click <a href="#">here</a> .
-----------------	--

## Adding a Guardian

When a guardian is added (whether at Case Creation or through Case Management) an informational message and a tool tip have been added to remind users **not** to select 'Add New Guardian' if the guardian to be added is in the system and displayed in the 'Search Results'.

- 'Add New Guardian' is only used if the guardian does not show up in 'Search Results'.
- To update an existing profile, add the guardian to the case, then make the updates in the Guardian Profile. Do not add the guardian again if some information in an existing profile has changed.

\* Search By: Party Name \* Guardian First Name: Didi \* Guardian Last Name: Gregorious [Reset] [Search]

Search Results Only select 'Add New Guardian' if the guardian profile does not exist in the system. To add a guardian with an existing profile, select the radio button next to the guardian's name and click Continue. 1

Select	Party Name : 0 <span style="border: 1px solid red; border-radius: 50%; padding: 2px;">2</span>	Address	Phone 1	DOB
<input type="radio"/>	didi gregorious	YANKEES STADIUM BRONX NJ 07102		

The guardian's profile information can be updated and saved after the guardian is added to the case.

[Cancel] [Add New Guardian] [Continue]

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## Address Field in Search Results

State has been added to the address field in 'Search Results'.

▼ Guardian Profile

\* Search By: Party Name \* Guardian First Name: martin \* Guardian Last Name: morse [Reset] [Search]

Search Results Only select 'Add New Guardian' if the guardian profile does not exist in the system. To add a guardian with an existing profile, select the radio button next to the guardian's name and click Continue.

Select	Party Name : 0	Address	Phone 1	DOB
<input type="radio"/>	Martin L Morse	Court St Montclair NJ 08833	2015556666	09/07/1983

[Cancel] [Add New Guardian] [Continue]

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## NJ Attorney ID Field Removed from Search Results

The NJ Attorney ID field has been removed from 'Search Results' because this information is not collected.

**▼ Guardian Profile**

\* Search By:  \* Guardian First Name:  \* Guardian Last Name:

Search Results


Select	Party Name	Address	Phone 1	DOB	NJ Attorney ID
<input type="radio"/>	susan r dargay	114 high street mount holly 08060			

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## Inactivating a Guardian

There must be at least one active guardian on every case. If a user tries to inactivate the sole active guardian an error message will display.

**▼ Guardian Profile**      THOMAS PLANTS      Appointment Date:      STATUS: INACTIVE

\* Party Type:       Party Action:  

\* First Name:       Middle name:       \* Last Name:       Suffix:

Alias:       Appointment Date:

\* New Qualification Required?:  (Noticing will occur based on most recent Judgment Date value.)

\* Is the Guardian an Attorney?:  Yes  No

\* Address Line 1:       Address Line 2:

\* City:       \* State:       \* Zip Code:

Phone 1:       Phone 2:

Email Address 1:       Email Address 2:

Social Security Number:         Date of Birth:       Relationship to IP:

Gender:

Interpreter Needed?:  Yes  No

Additional Profile Info:

eCOURTS HOME    **CASE MANAGEMENT**    UPLOAD DOCUMENT    CASE JACKET    User: susan.flynn

Case Search    Report Review

Manage Case

Legacy Guardianship Monitoring System (GMS) case: Review latest judgment(s) to verify and/or update reporting requirements below.

✖ There must be at least one active guardian on a case.

[\(Back\)](#)

## Upload Documents

The file size for uploads is increased to 25MB for internal users. External users remain limited to 7MB upload size.

### Upload Documents

[Back](#)


▼ Case Details County Docket No.: mer2017-2 [View Case Jacket](#)

**Documents Due:**

Documents listed below are either missing or overdue, and therefore need to be uploaded.

- Qualification Documents from Guardian TESTING
- Inventory Report from Guardian TESTING

**Select Document Type**

<b>* Document Type:</b> Case Initiation Documents ▼	<b>* Net Estate Value:</b> 5,500	 <input type="button" value="Choose File"/> No file chosen
--	-------------------------------------	---

[+](#)

[Back](#) [Continue](#)

[\(Back\)](#)





# eCourts Guardianship – Civil Release

## Notes

07/24/2020

### Case Management

 <p>Enhanced</p>	<p>The IP Attorney Profile contains a new field that displays the attorney's most current standing status. For more information, click <a href="#">here</a>.</p>
 <p>Fixed</p>	<p>All attorneys can be added to a new case or an existing case, regardless of standing status. For more information, click <a href="#">here</a>.</p>

## IP Attorney Profile – New Field

A new field has been added to the IP Attorney Profile to display the attorney's current good standing status. The field updates automatically if the status changes.

eCOURTS HOME		CASE MANAGEMENT	UPLOAD DOCUMENT	CASE JACKET	User: !
Case Search		Report Review			
Manage Case					
▼ Case Details		County Docket No.: 2019-76		<a href="#">View Case Jacket</a>	
County: WARREN		Status: ACTIVE		Date Filed: 05/07/2019	
▶ Judgment		07/17/2019			
▶ Estate Value		Initial Estate Value: \$		Current Net Estate Value: \$	
▶ Incapacitated Person (IP) Profile		BARBIE LUPINE		STATUS: ACTIVE	
▼ IP Attorney Profile		JUSTIN PITT		STATUS: INACTIVE	
Attorney Bar ID: <input type="text"/>		<input type="button" value="Search"/>		<a href="#">Search Attorney Index</a>	
Select	Attorney Name	Firm Name	Firm Address		
<input checked="" type="radio"/>	JUSTIN PITT	ANDREWS & SS LAW FIRM	25 MARKET ST. 7TH FLOOR NORTH SIDE TRENTON NJ 08625		
<input type="radio"/>	JUSTIN PITT	LAWYERS FUND FOR CLIENT PROTECTION	25 W MARKET ST PO BOX 961 TRENTON NJ 086250961		
First Name: <input type="text" value="JUSTIN"/>		Middle Name: <input type="text"/>		Last Name: <input type="text" value="PITT"/>	
				Suffix: <input type="text" value=""/>	
NJ Attorney ID: <input type="text" value="016572000"/>		Good Standing Status: <input type="text" value="ADMIN INELIGIBLE"/>		* Discharged?: <input checked="" type="radio"/> Yes <input type="radio"/> No	
IP Attorney Firm: <input type="text" value="ANDREWS &amp; SS LAW FIRM"/>					
Address Line 1: <input type="text" value="25 MARKET ST."/>		Address Line 2: <input type="text" value="7TH FLOOR NORTH SIDE"/>		Zip Code: <input type="text" value="08625"/>	
City: <input type="text" value="TRENTON"/>		State: <input type="text" value="NJ"/>			
Phone 1: <input type="text"/>		Phone 2: <input type="text"/>			
Email Address 1: <input type="text"/>		Email Address 2: <input type="text"/>			
				<input type="button" value="Cancel"/> <input type="button" value="Save"/>	

[\(Back\)](#)

## IP Attorney Profile – Case Creation

When a new case is being created, eCourts will now allow an attorney to be added regardless of good standing status (retired, deceased, admin ineligible, etc.).

- 1) Enter the Attorney Bar ID
- 2) Click 'Search'
- 3) Select the radio button
- 4) Select 'yes' or 'No'
- 5) Click 'Continue'

Judiciary eCourts System - Guardianship Home Help

New Jersey Courts  
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eCOURTS HOME CASE MANAGEMENT **UPLOAD DOCUMENT** CASE JACKET User:

Search for Attorney of Incapacitated Person

Back

▼ Case Details County Docket No.: 3333-2020  
County: WARREN Status: Date Filed: 02/11/2020

► Judgment 07/22/2020

► Incapacitated Person (IP) Profile HARLEY PRESTON STATUS: ACTIVE

▼ IP Attorney Profile 1

\* Attorney Bar ID: 007412005 Search 2 [Search Attorney Index](#)

Select	Attorney Name	Firm Name	Firm Address
<input checked="" type="radio"/> 3	TEST ERIC BRAND III	CARTER LEDYARD & MILBURN, LLP	2 WALL STREET NEW YORK CITY NY 10005

\* Discharged:  Yes  No 4

Back Continue 5

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# eCourts Guardianship Report Review – Civil Release Notes

07/24/2020

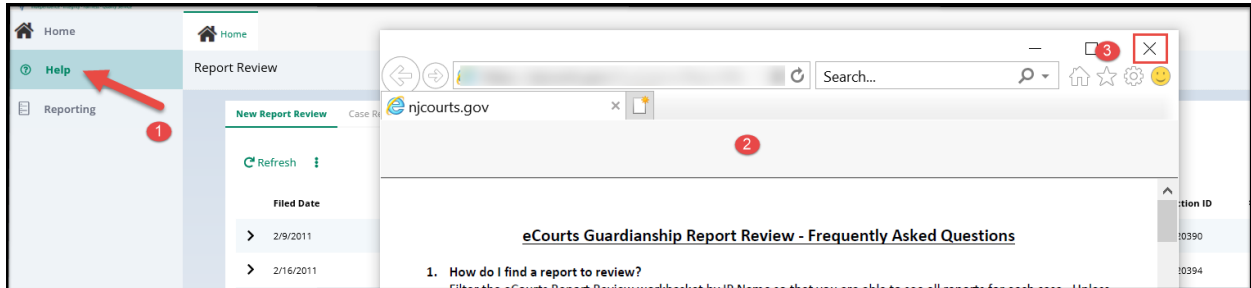
## Report Review

<b>Enhanced</b>	The 'Help' link displays a PDF containing FAQs for completing a review. For more information, click <a href="#">here</a> .
<b>Removed</b>	The 'Recents' list has been temporarily removed from Report Review. For more information, click <a href="#">here</a> .
<b>Fixed</b>	The 'Reporting' link will not display for users with 'New Report Review' tab access only. For more information, click <a href="#">here</a> .

## Help Feature

'Help' can be accessed by all users and from any screen in Report Review.

- 1) Click 'Help'
- 2) A PDF will open in a separate window
- 3) To close the PDF, click the 'X' in the upper right corner

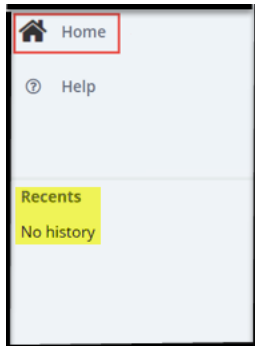


[\(Back\)](#)

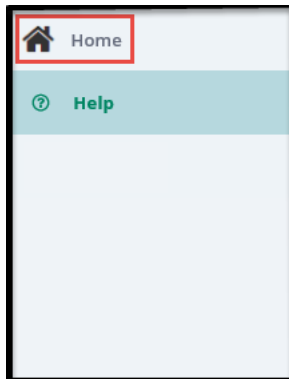
## 'Recents' List

The 'Recents' list feature has been temporarily removed from Report Review. Users will no longer see the feature.

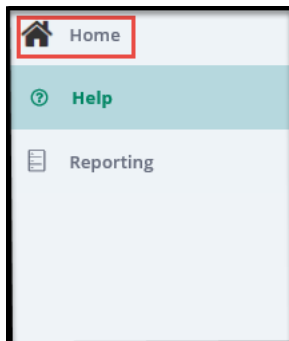
Prior view:



Current view for users with access limited to the 'New Report Review' tab:



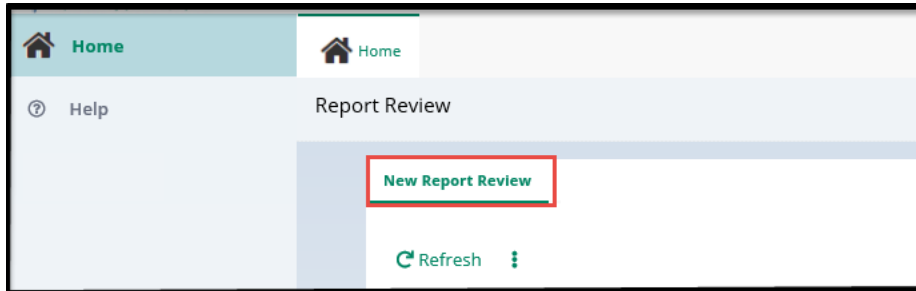
Current view for users with access to the 'New Report Review' and 'Case Review' tabs:



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## 'Reporting' Link Hidden for Some Users

For users with access limited to the 'New Report Review' tab, the 'Reporting link will no longer display.






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# eCourts – Civil Guardianship Release


## Notes

07/10/2020

### Case Management

	Closed cases can be re-opened in Case Management by all users. For more information, click <a href="#">here</a> .
	When a case is deleted from Case Management, a reason must be provided. For more information, click <a href="#">here</a> .
	The New Qualifications Required checkbox in guardian profiles has been fixed so that users can only check the box if an amended judgment has been uploaded to the Case Jacket. For more information, click <a href="#">here</a> .

### Upload Document

	'Formal Accounting' has been added as a new document type in the Upload Document tab. For more information, click <a href="#">here</a> .
---	--



## Re-Opening Cases

If a case needs to be re-opened:

- Click on 'Case Action'
- Select 'Reopen Case'
- Click 'Save'
- A success message will display
- When the case is searched again, the status will be 'ACTIVE'

The screenshot shows the 'Manage Case' page in the Judiciary eCourts System - Guardianship. The page header includes the New Jersey Courts logo and navigation links. The main content area displays case details for County WARREN, with a status of 'CLOSED'. The 'Case Action' dropdown menu is open, showing 'Reopen Case' as the selected option. A red arrow points to this option. The 'Save' button is highlighted with a red box. Below the case details, there is a 'Guardian' section with a plus sign and a 'Find New Case' button.

After clicking 'Save', a success message displays:

### Manage Case

✔ Case Action saved successfully

The 'Status' of the case will update to "ACTIVE":

The screenshot shows the 'New Jersey Courts' eCourts System interface for Guardianship. The header includes the logo and the text 'Judiciary eCourts System - Guardianship'. Below the header is a navigation bar with tabs for 'eCOURTS HOME', 'CASE MANAGEMENT', 'UPLOAD DOCUMENT', and 'CASE JACKET'. A 'User:' field is visible on the right. The main content area is titled 'Manage Case' and displays a table of case details. The 'Status' field is highlighted with a red box and contains the text 'ACTIVE'. Other fields include County (WARREN), County Docket No. (warren-25), Date Filed (01/01/2019), Judgment (09/27/2019), Estate Value (Initial: \$ 0, Current Net: \$ 555), Incapacitated Person (IP) Profile (PETER PREP), IP Attorney Profile (HENRY EMIL RAVI), and Guardian Profile (RUTGERS COMMUNITY LAW CLINIC). A 'Guardian +' button is located at the bottom left, and a 'Find New Case' button is at the bottom right.

▼ Case Details		County Docket No.: warren-25	<a href="#">View Case Jacket</a>
County: WARREN	Status: ACTIVE	Date Filed: 01/01/2019	
▶ Judgment	09/27/2019		
▶ Estate Value	Initial Estate Value: \$ 0	Current Net Estate Value: \$ 555	
▶ Incapacitated Person (IP) Profile	PETER PREP		STATUS: ACTIVE
▶ IP Attorney Profile	HENRY EMIL RAVI		STATUS: ACTIVE
▶ Guardian Profile	RUTGERS COMMUNITY LAW CLINIC	Appointment Date:	STATUS: ACTIVE
▶ Case Action			
Guardian +			
<a href="#">Find New Case</a>			

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## Deleting a Case

If a case has been entered in error and must be deleted:

- Click 'Case Action'
- Select 'Delete Case'
- Select a reason for deleting the case:
  - Wrong docket number (docket number cannot be changed once a case is saved, therefore, a case must be deleted to correct the docket number)
  - Duplicate (if the same case is entered twice)
  - Other (must add a short description in the text box, i.e., "Not a guardianship case")
- Click 'Save'
- A Confirmation Pop-up will display
  - Select 'Yes' to complete the deletion
  - Select 'No' to return to the Manage Case screen
- A success message displays upon deletion

**NOTE:** Deletion is permanent. A case cannot be re-opened after deletion.

The screenshot shows the 'Manage Case' interface for a guardianship case. The case details include County Docket No.: warren-25, County: WARREN, Status: ACTIVE, Date Filed: 01/01/2019, Judgment: 09/27/2019, Initial Estate Value: \$ 0, Current Net Estate Value: \$ 555, Incapacitated Person (IP) Profile: PETER PREP (STATUS: ACTIVE), IP Attorney Profile: HENRY EMIL RAVI (STATUS: ACTIVE), and Guardian Profile: RUTGERS COMMUNITY LAW CLINIC (Appointment Date: , STATUS: ACTIVE). The 'Case Action' dropdown is set to 'Delete Case', and the 'Case Delete Reason' dropdown is set to 'Wrong Docket Number'. The 'Save' button is highlighted with a red box.

If 'Other' is selected, provide a brief reason in 'Description of Other':


The screenshot shows the 'Case Action' dropdown menu with 'Delete Case' selected. The 'Case Delete Reason' dropdown is set to 'Other', and the 'Description of Other' text box is empty.

Confirmation Pop-up (clicking 'No' returns you to the Manage Case screen):

**Confirmation Required**

Case will be Deleted Permanently, Are You Sure?

Judiciary eCourts System - Guardianship Home | Help

 **New Jersey Courts**  
Independence • Integrity • Fairness • Quality Service

eCOURTS HOME | **CASE MANAGEMENT** | UPLOAD DOCUMENT | CASE JACKET | User: \_\_\_\_\_

Case Search | Report Review

### Manage Case

✔ Case Action saved successfully

<b>▼ Case Details</b>	County Docket No.: warren-25	<a href="#">View Case Jacket</a>
County: WARREN	Status: ACTIVE	Date Filed: 01/01/2019
<b>▶ Judgment</b>	09/27/2019	
<b>▶ Estate Value</b>	Initial Estate Value: \$ 0	Current Net Estate Value: \$ 555
<b>▶ Incapacitated Person (IP) Profile</b>	PETER PREP	STATUS: ACTIVE
<b>▶ IP Attorney Profile</b>	HENRY EMIL RAVI	STATUS: ACTIVE
<b>▶ Guardian Profile</b>	RUTGERS COMMUNITY LAW CLINIC	Appointment Date: STATUS: ACTIVE
<b>▼ Case Action</b>		
* Case Action:	<input type="text" value="Delete Case"/>	
* Case Delete Reason:	<input type="text" value="Duplicate Case"/>	

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## Qualification Required Checkbox Behavior

The 'New Qualification Required?' checkbox in each guardian profile is disabled unless an amended judgment has been uploaded to the Case Jacket.

**NOTE:** The Tool Tip reminds users to first upload the amended judgment if the guardian is required to file new Qualification Documents.

### Manage Case

<b>▼ Case Details</b>		County Docket No.: P-8675	<a href="#">View Case Jacket</a>
County: HUDSON	Status: ACTIVE	Date Filed: 05/10/2017	
<b>▶ Judgment</b>	12/07/2017		
<b>▶ Estate Value</b>	Initial Estate Value: \$ 450	Current Net Estate Value: \$ 450	
<b>▶ Incapacitated Person (IP) Profile</b>	MARSHA BRADY	STATUS: ACTIVE	
<b>▶ IP Attorney Profile</b>	TEST ERIC BRAND III	STATUS: INACTIVE	
<b>▼ Guardian Profile</b>	JAN BRADY	Appointment Date:	STATUS: ACTIVE
* Party Type:	Guardian of Person	Party Action:	ACTIVE
* First Name:	jan	* Last Name:	brady
Alias +	If new qualification documents are required for this guardian, first upload the amended judgment. Then return to this screen to make updates.		Suffix:
* New Qualification Required?:	<input type="checkbox"/> (Noticing will occur based on most recent Judgment Date value.)		
* Is the Guardian an Attorney?:	<input checked="" type="radio"/> Yes <input type="radio"/> No		
* Address Line 1:	Test Drive	Address Line 2:	
* City:	Oakland	* State:	NJ
Phone 1:		* Zip Code:	34555
Email Address 1:		Phone 2:	
		Email Address 2:	
Social Security Number:		Date of Birth:	02/06/1958
Gender:	Female	Relationship to IP:	Sibling
Interpreter Needed?:	<input type="radio"/> Yes <input type="radio"/> No		
Additional Profile Info:			
			<a href="#">Cancel</a> <a href="#">Save</a>

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## New Document Type - Formal Accounting

'Formal Accounting' has been added as a new document type.

**NOTE:** Refer to the caption of the document for guidance in selecting the appropriate document type. Formal Accountings are typically ordered in the Judgment of Incapacity and Appointment of a Guardian of the Person and Estate. Formal Accountings are not subject to review in Report Review. Contact your county Program Coordinator or Civil Practice with questions about whether a document is a Formal Accountings.

The screenshot displays the 'Judiciary eCourts System - Guardianship' interface. At the top, there is a navigation bar with 'eCOURTS HOME', 'CASE MANAGEMENT', 'UPLOAD DOCUMENT', and 'CASE JACKET'. The 'UPLOAD DOCUMENT' tab is active. Below the navigation bar, the 'Upload Documents' section is highlighted with a red box. A 'Back' button is visible. The 'Case Details' section shows 'County Docket No.: P-8675' and a 'View Case Jacket' link. The 'Documents Due' section lists missing or overdue documents: Judgment, Qualification Documents from Guardian BRADY, JAN, and Inventory Report from Guardian BRADY, JAN. The 'Select Document Type' section features a dropdown menu with a plus sign on the left. The dropdown menu is open, showing a list of document types: Case Initiation Documents, Judgment, Qualification Documents, Inventory Report, Well-Being Report, SS Representative Payee Report, EZ Accounting Report, Comprehensive Accounting Report, Annual Report, Formal Accounting (highlighted with a red arrow), Amended Judgment, Subsequent Order, New Report Review Results, and Finance Review Results. A 'Browse...' button is located to the right of the dropdown menu. 'Back' and 'Continue' buttons are at the bottom right of the 'Select Document Type' section.

To upload a Formal Accounting: 1) select 'Formal Accounting'; 2) 'Filed Date' = the stamped filed date; 3) select the guardian(s) that filed the Formal Accounting (CTRL + Left Click to select multiple guardians); 4) upload the PDF by clicking on Browse; and 5) click 'Continue'

The screenshot shows the 'Judiciary eCourts System - Guardianship' interface. At the top, there is a navigation bar with 'Home' and 'Help' links. Below this is the 'New Jersey Courts' logo with the tagline 'Independence • Integrity • Fairness • Quality Service'. The main navigation menu includes 'eCOURTS HOME', 'CASE MANAGEMENT', 'UPLOAD DOCUMENT' (highlighted), and 'CASE JACKET'. A 'User:' field is visible on the right.

The 'Upload Documents' section is highlighted with a red box. Below it is a 'Back' button. The 'Case Details' section shows 'County Docket No.: P-8675' and a 'View Case Jacket' link. The 'Documents Due:' section lists documents that are missing or overdue, including 'Judgment', 'Qualification Documents from Guardian BRADY, JAN', and 'Inventory Report from Guardian BRADY, JAN'.

The 'Select Document Type' section contains a table with the following fields:

Document Type	Filed Date	Guardian(s)	File
Formal Accounting		JAN BRADY OFFICE OF THE PUBLIC GUARDIAN	Browse...

Numbered callouts (1-5) indicate the following steps: 1) Select 'Formal Accounting' in the Document Type dropdown; 2) Enter the Filed Date; 3) Select the Guardian(s); 4) Click the 'Browse...' button to upload the PDF; 5) Click the 'Continue' button.

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# eCourts – Civil Guardianship Release

## Notes

6/19/2020

### Case Management

<b>Fixed</b>	All users can locate closed cases via the search in Case Management and Upload Document. For more information, click <a href="#">here</a> .
<b>Fixed</b>	The docket number field will accept up to 15 characters. For more information, click <a href="#">here</a> .
<b>Fixed</b>	An error message will display if an incorrect format is used for SSNs. For more information, click <a href="#">here</a> .
<b>Fixed</b>	Updates to a guardian profile will save and display in each case to which the guardian is associated. For more information, click <a href="#">here</a> .
<b>Fixed</b>	When adding a guardian to a case, populated phone number and DOB fields will display in search results. For more information, click <a href="#">here</a> .

### Upload Document tab

<b>Fixed</b>	When Case Initiation Documents are uploaded on legacy cases, the net estate value field is enabled. For more information, click <a href="#">here</a> .
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## Searching for Closed Cases

All users can search for closed cases in the Case Management and Upload Document tabs.

Note:

- The re-open function is not available yet. Contact your Program Coordinator if a case needs to be re-opened.
- Documents can be uploaded to the Case Jacket on a closed case, but reports will not be sent to Report Review.


The screenshot shows the 'Manage Case' section of the eCourts System. It features two search options: 'Search for County Docket Number (exact):' with a text input field and a 'Search' button, and 'Search for Incapacitated Person:' with 'First Name' (containing 'Marsha') and 'Last Name' (containing 'Brady') input fields, a 'Reset' button, and a 'Search' button. A red note above the search fields states: 'Only alphabetic characters can be entered in name fields.'

## Case Management: Case status displays as "CLOSED"

The screenshot displays the 'Case Details' section for a case with County Docket No. P-8675. The status is highlighted as 'CLOSED'. The case was filed on 05/10/2017 and has a judgment date of 12/07/2017. The case involves an incapacitated person, Marsha Brady, with an attorney, Test Eric Brand III, and a guardian, Jan Brady. The initial estate value and current net estate value are both listed as '\$'. A 'Find New Case' button is located at the bottom right.

▼ Case Details	County Docket No.: P-8675	<a href="#">View Case Jacket</a>
County: HUDSON	Status: <b>CLOSED</b>	Date Filed: 05/10/2017
▶ Judgment	12/07/2017	
▶ Estate Value	Initial Estate Value: \$	Current Net Estate Value: \$
▶ Incapacitated Person (IP) Profile	MARSHA BRADY	STATUS: ACTIVE
▶ IP Attorney Profile	TEST ERIC BRAND III	STATUS: INACTIVE
▶ Guardian Profile	JAN BRADY	Appointment Date: STATUS: ACTIVE
▶ Guardian Profile	OFFICE OF THE PUBLIC GUARDIAN	Appointment Date: STATUS: ACTIVE
▶ Case Action	Guardian +	

Upload Document: Case status displays as "CLOSED"


Home | Help

QA - Internal


[eCOURTS HOME](#) | 
 [CASE MANAGEMENT](#) | 
 [UPLOAD DOCUMENT](#) | 
 [CASE JACKET](#)
User: \_\_\_\_\_

---

View Case Details

[Back](#)

<b>▼ Case Details</b>		County Docket No.: P-8675	<a href="#">View Case Jacket</a>
County: HUDSON	Status: CLOSED	Date Filed: 05/10/2017	
<b>▶ Judgment</b>	12/07/2017		
<b>▶ Estate Value</b>	Initial Estate Value: \$	Current Net Estate Value: \$	
<b>▶ Incapacitated Person (IP) Profile</b>	MARSHA BRADY	STATUS: ACTIVE	
<b>▶ IP Attorney Profile</b>	TEST ERIC BRAND III	STATUS: INACTIVE	
<b>▶ Guardian Profile</b>	JAN BRADY	Appointment Date:	STATUS: ACTIVE
<b>▶ Guardian Profile</b>	OFFICE OF THE PUBLIC GUARDIAN	Appointment Date:	STATUS: ACTIVE

Guardian 

[Back](#) | 
 [Continue](#)

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## Docket Number Field

The docket number field has been shortened to accept up to 15 characters. Users will no longer experience the problem of entering a 16 character docket number that the system truncates.

NOTE: this is a prospective change. Truncated docket numbers will remain for those cases entered before this fix was deployed.

Judiciary eCourts System - Guardianship Home Help

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eCOURTS HOME CASE MANAGEMENT **UPLOAD DOCUMENT** CASE JACKET User:

Initial Complaint and Judgment Details

Back

⚠ Please verify the docket number for accuracy. Once submitted, the docket number cannot be modified.

\* County: WARREN County Docket Number: Verified Complaint Filed Date:

▼ Judgment

[\(Back\)](#)

## Social Security Number Field

When creating or updating a case, the social security number field in the profiles of incapacitated persons and guardians will display an error message if an improper number is entered.

NOTE: if the file does not contain a complete SSN, leave the field blank.

**Manage Case**

✘ Please enter a valid SSN. If SSN is not available, leave field blank.

<b>▼ Case Details</b>		County Docket No.: cp-0888-2018	<a href="#">View Case Jacket</a>
County: ESSEX	Status: ACTIVE	Date Filed: 02/02/2018	
<b>▶ Judgment</b>	03/06/2018		
<b>▶ Estate Value</b>	Initial Estate Value: \$ 2,000	Current Net Estate Value: \$ 12,345	
<b>▶ Incapacitated Person (IP) Profile</b>	SHELBY CARPENTER	STATUS: ACTIVE	
<b>▶ IP Attorney Profile</b>	PHOEBE CHRISTIAN BENTLEY	STATUS: INACTIVE	
<b>▶ Guardian Profile</b>	DIDI GREGORIOUS	Appointment Date:	STATUS: INACTIVE
<b>▼ Guardian Profile</b>	LAURA HUNT	Appointment Date: 03/06/2018	STATUS: ACTIVE

\* Party Type:  Party Action:

\* First Name:  Middle name:  \* Last Name:  Suffix:

Alias + Appointment Date:

\* New Qualification Required?:  (Noticing will occur based on most recent Judgment Date value.)

\* Is the Guardian an Attorney?:  Yes  No

\* Address Line 1:  Address Line 2:

\* City:  \* State:  \* Zip Code:

Phone 1:  Phone 2:

Email Address 1:  Email Address 2:

Social Security Number:    Date of Birth:

Gender:  Relationship to IP:

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## Updates to a Guardian Profile

When a change or update is saved to a guardian profile, that change will reflect in all cases to which that guardian is associated.

- Make the change/update to the appropriate field
- Click 'Save'

**Guardian Profile** LAURA HUNT Appointment Date: STATUS: ACTIVE

\* Party Type: Guardian of Person and Estate  
 \* First Name: Laura Middle name: \* Last Name: Hunt Party Action: ACTIVE  
 Suffix: Appointment Date:

\* New Qualification Required?:  (Noticing will occur based on most recent Judgment Date value.)  
 \* Is the Guardian an Attorney?:  Yes  No

\* Address Line 1: 402 West 1st St Address Line 2:  
 \* City: Newcity \* State: NJ \* Zip Code: 55555  
 Phone 1: 9085551212 Phone 2:  
 Email Address 1: Email Address 2:

Social Security Number: Date of Birth: Relationship to IP:  
 Gender: Female

Interpreter Needed?:  Yes  No  
 Additional Profile Info:

Cancel Save

NOTE: When creating a case, do not select 'Add New Guardian' if the guardian exists in the system. **Only select** 'Add New Guardian' if you are adding a new guardian. If an address or other information has changed, select the existing guardian profile from the search results and update the profile as necessary (see above).

1. Always click 'Search' when adding a guardian
  2. If results display in the 'Search Results' section for the guardian you want to add to the case, click the radio button
  3. Select 'Continue'
- \*The guardian will be added to the case. If changes or updates need to be made to the guardian's profile information, make them as described above.

**Guardian Profile**

\* Search By: Party Name \* Guardian First Name: Iris \* Guardian Last Name: Johnson Reset Search

Search Results

Select	Party Name	Address	Phone 1	DOB	NJ Attorney ID
<input checked="" type="radio"/>	Iris Johnson	Flower Court Tuliptown 99999	9087777777		

Cancel Add New Guardian Continue

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## Guardian Profile Information – Adding a Guardian to a Case

When adding a guardian to a case, if the profile contains the guardian’s phone number or DOB, that information will display in the search results.

NOTE: as stated above, if this is the guardian you want to associate to the case, click the radio button and select ‘Continue’. Updates can be made to the guardian profile after clicking ‘Continue’. **Only select** ‘Add New Guardian’ if you are adding a new guardian to the system.

▼ Guardian Profile

\* Search By:  \* Guardian First Name:  \* Guardian Last Name:

Search Results

Select	Party Name	Address	Phone 1	DOB	NJ Attorney ID
<input type="radio"/>	Iris Johnson	Flower Court Tuliptown 99999	9087777777		

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## Estate Value Field at Upload of Case Initiation Documents

When uploading Case Initiation Documents on a legacy case, the net estate value field is enabled.

NOTE: the 'Net Estate Value' field is enabled only for the first upload of Case Initiation Documents.

Judiciary eCourts System - Guardianship Home Help

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QA - Internal

eCOURTS HOME CASE MANAGEMENT **UPLOAD DOCUMENT** CASE JACKET User: susan.flynn

Upload Documents

Back

▼ Case Details County Docket No.: DC-324234-16 View Case Jacket

Documents Due:

Documents listed below are either missing or overdue, and therefore need to be uploaded.

- Qualification Documents from Guardian SMITH, MARY
- Qualification Documents from Guardian S, A

Select Document Type

* Document Type:	* Net Estate Value:	Browse...
Case Initiation Documents	<input type="text"/>	<input type="button" value="Browse..."/>

Back Continue




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# eCourts Guardianship – Civil Release


## Notes

05/29/2020

### Case Management

	The Qualifications Required checkbox now also clears automatically after an overdue notice has been sent. For more information, click <a href="#">here</a> .
	Users can check the Qualifications Required checkbox and save in Case Management. For more information, click <a href="#">here</a> .
	The Estate Value table has been enhanced to automatically sort reports. For more information, click <a href="#">here</a> .

### Case Jacket

	The Blue Stamp on overdue notices has been fixed. For more information, click <a href="#">here</a> .
---	--



## Clearing the Qualifications Required Checkbox

The 'Qualifications Required?' checkbox will automatically clear (see below) if: 1) Qualification Documents are uploaded; OR 2) an overdue notice has been sent.

▼ Guardian Profile		LAURA HUNT	Appointment Date: 03/06/2018	STATUS: ACTIVE		
* Party Type:	Guardian of Person and Estate ▼	Middle name:		Party Action: ACTIVE ▼		
* First Name:	Laura	* Last Name:	Hunt	Suffix: ▼		
Alias +		Appointment Date:	03/06/2018			
* New Qualification Required?:	<input type="checkbox"/> (Noticing will occur based on most recent Judgment Date value.)					
* Is the Guardian an Attorney?:	<input type="radio"/> Yes <input checked="" type="radio"/> No					
* Address Line 1:	402 West 1st St	Address Line 2:				
* City:	Newcity	* State:	NJ ▼	* Zip Code:	55555	ZIP
Phone 1:		Phone 2:				
Email Address 1:		Email Address 2:				
Social Security Number:		Date of Birth:		Relationship to IP:		▼
Gender:	Female ▼					
Interpreter Needed?:	<input type="radio"/> Yes <input type="radio"/> No					
Additional Profile Info:						
				Cancel	Save	


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## Selecting the Qualifications Required Checkbox for Existing Guardians

If an existing guardian must file new Qualification Documents, upload the amended judgment (covered in prior Release Notes), open the Guardian Profile, and:

- 1) Select the checkbox
- 2) Click 'Save'
- 3) The success message will display


### Manage Case

 Updated Guardian successfully 3

<b>▼ Case Details</b>	County Docket No.: cp-0888-2018	<a href="#">View Case Jacket</a>
County: ESSEX	Status: ACTIVE	Date Filed: 02/02/2018
<b>▶ Judgment</b>	03/06/2018	
<b>▶ Estate Value</b>	Initial Estate Value: \$ 2,000	Current Net Estate Value: \$ 12,345
<b>▶ Incapacitated Person (IP) Profile</b>	SHELBY CARPENTER	STATUS: ACTIVE
<b>▶ IP Attorney Profile</b>	PHOEBE CHRISTIAN BENTLEY	STATUS: INACTIVE
<b>▶ Guardian Profile</b>	DIDI GREGORIOUS	Appointment Date: STATUS: INACTIVE
<b>▼ Guardian Profile</b>	LAURA HUNT	Appointment Date: 03/06/2018 STATUS: ACTIVE

\* Party Type:  Party Action:


\* First Name:  Middle name:  \* Last Name:  Suffix:

Alias  1 Appointment Date:

\* New Qualification Required?:  (Noticing will occur based on most recent Judgment Date value.)

\* Is the Guardian an Attorney?:  Yes  No

\* Address Line 1:  Address Line 2:

\* City:  \* State:  \* Zip Code:  

Phone 1:  Phone 2:

Email Address 1:  Email Address 2:

Social Security Number:    Date of Birth:

Gender:  Relationship to IP:

Interpreter Needed?:  Yes  No

Additional Profile Info:

2

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## Estate Value Table

The Estate Value table has been enhanced to automatically sort in the following order:

- By filed date, with the most recent report at the top of the table
- If all filed dates are the same:
  - 1<sup>st</sup> - Case Initiation Documents
  - 2<sup>nd</sup> - Inventory Report (if filed)
  - Then: periodic reports with the most recently uploaded at the top of the table

NOTE: the Percentage Change column in the Estate Value table has been temporarily hidden.

▼ Estate Value		Initial Estate Value: \$ 15,800	Current Net Estate Value: \$ 18,900
Initial Estate Value: <input type="text" value="15,800"/>			
Date	Estate Value	Action	Entered By
02/20/2020	\$18,900	EZ Accounting Report	susan.flynn
02/20/2020	\$14,000	EZ Accounting Report	susan.flynn
06/12/2019	\$15,800	Inventory Report	susan.flynn
02/06/2019	\$15,900	Case Initiation Documents	susan.flynn

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## Case Jacket

The Blue Stamp on overdue notices and PDFs generated in Report Review have been fixed to display in the approved format:

- Security
- County code in parens
- Docket number
- Date and time of upload to Case Jacket
- Number of pages in the upload
- Transaction ID of the notice






CONFIDENTIAL (ESX) cp-0888-2018 05/12/2020 10:46:54 AM Pg 1 of 1 Trans ID: GMP20201718

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# eCourts – Civil Guardianship Report Review Release Notes

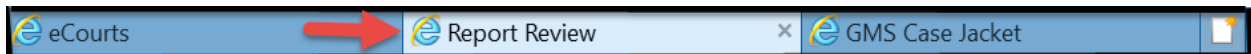
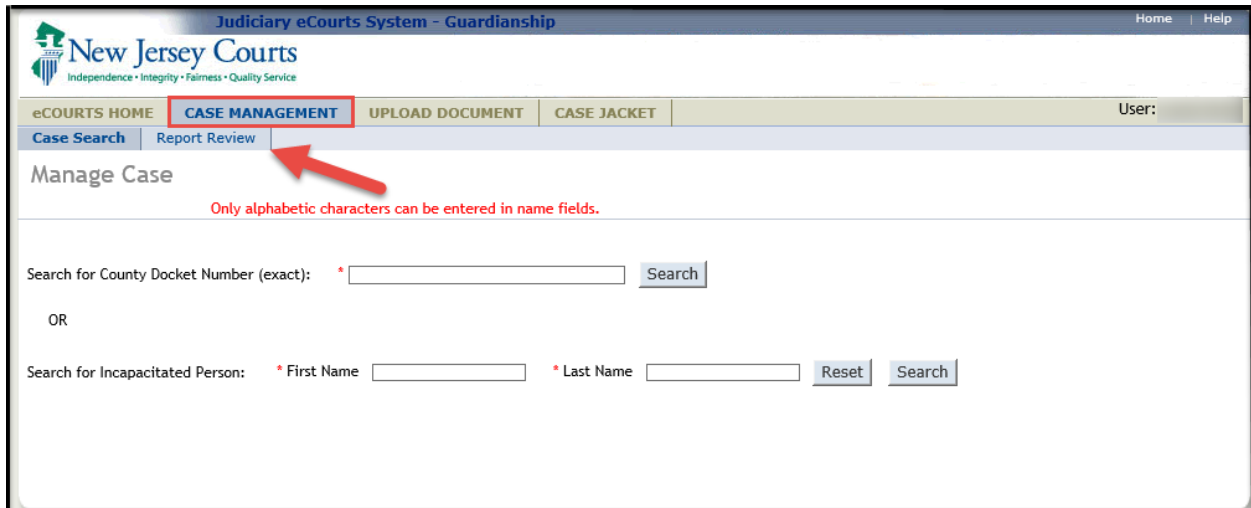
05/29/2020

## Report Review

	The New Report Review level of Report Review has been deployed, primarily for use by Program Coordinators. For more information, click <a href="#">here</a> .
	Certain features are not available or have limited functionality for the initial roll-out. For more information, click <a href="#">here</a> .
	The work screens feature guided questions. For more information, click <a href="#">here</a> .
	At the end of the initial review, a PDF summary will automatically post to the Case Jacket. For more information, click <a href="#">here</a> .
	Case Reviewers will have read only access to the reviews completed in the New Report Review workbasket. For more information, click <a href="#">here</a> .

# Report Review Basic Features

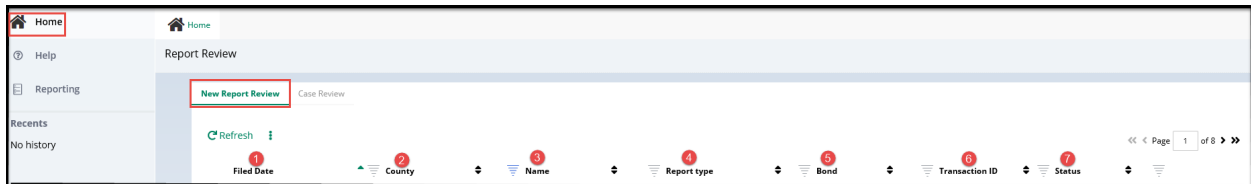
Report Review is a sub-tab within Case Management, and opens as its own tab.



Report Review defaults to the 'New Report Review' workbasket. This workbasket contains all new reports that have not yet been reviewed.

#### Overview:

- Clicking the 'Home' icon will return the user to the user's default screen/view, based on security. Volunteers will see only the 'New Report Review' workbasket. Users with broader security will see the New Report Review and Case Review both workbaskets, as below.
- Columns:
  1. Filed Date = stamped filed date
  2. County
  3. Name = First Name Last Name
  4. Report Type = Annual, Inventory, EZ Accounting, Comprehensive or Accounting
  5. Bond = most recent bond. If an amended bond is entered, that will display here. If there is no bond, the field is blank.
  6. Transaction ID
  7. Status = 'New Report' for reviews that are untouched; 'New Report Draft' for reviews saved but not submitted.



- Sorting and filtering – the default sort is oldest first by Filed Date
  - The ▲ or ▼ icons allow for sorting of the columns
  - The ≡ icon allows for the columns to be filtered by specific data

New Report Review Case Review

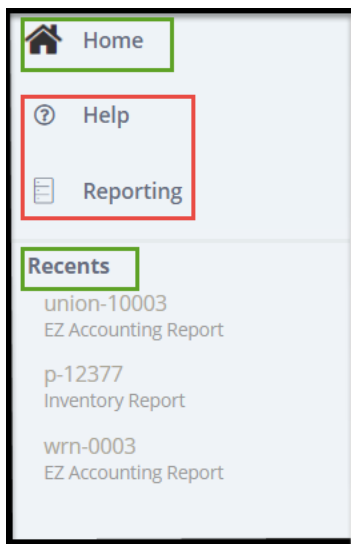
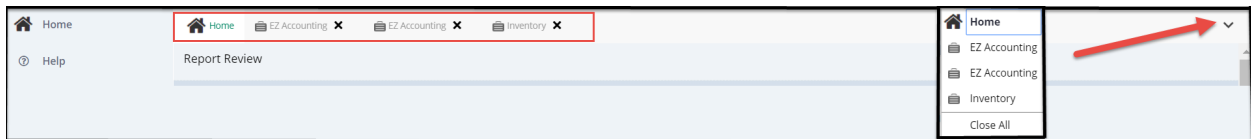
Refresh

Page 1 of 8

Filed Date	County	Name	Report type	Bond	Transaction ID	Status	
> 12/28/2009	Mercer	Alfred Butler		\$2,000	GMP2020289	New Report Draft	Continue
> 2/9/2010	Mercer	Alfred Butler		\$2,000	GMP2020283	New Report Draft	Continue
> 9/13/2011	Mercer	Alfred Butler	counting	\$2,000	GMP2020286	New Report	Begin
> 3/6/2012	Mercer	Alfred Butler		\$2,000	GMP2020285	New Report	Begin
> 12/18/2012	Mercer	Alfred Butler	Annual Report	\$2,000	GMP2020288	New Report	Begin
> 3/28/2017	Mercer	Charles Curtis	Inventory	\$2,000	GMP2017124	New Report	Begin
> 4/5/2017	Mercer	Lillian Leeds	Inventory	\$20,000	GMP2017148	New Report	Begin
> 7/2/2018	Mercer	Test First 1 Test Last 1	Inventory	\$0	GMP2018431	New Report	Begin
> 7/3/2018	Mercer	Wade Wilson	Inventory	\$100	GMP2018467	New Report	Begin
> 8/17/2018	Mercer	Test First 12 Test Last 12	EZ Accounting	\$0	GMP2018566	New Report	Begin

- Navigation


- Only four (4) tabs may be open at the same time
- The carot on the far right opens when clicked. Users can navigate to a report by clicking on the report name, or close all open reports by clicking 'Close All'.
- Clicking the 'Home' icon will return the user to the default workbasket screen.
- The 'Recents' list is an informational list of reviews opened during a particular work session. It is user and session specific.

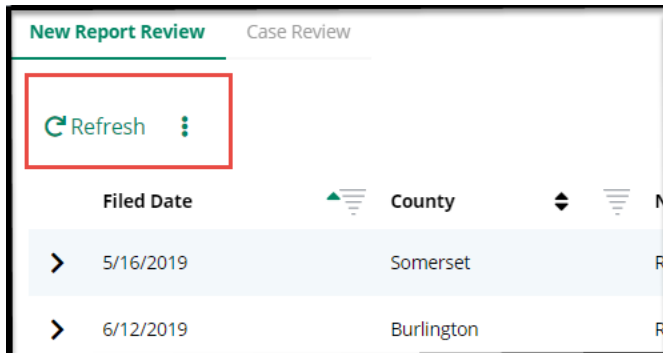
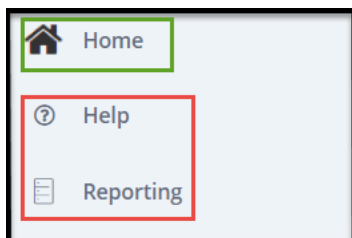


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## Features Not Yet Available

- 'Help'
- 'Reporting'
- 'Refresh'
- The 'kabob' menu  (in future releases this feature will include the ability to customize the columns displayed)
- Quick Link directly to the report in Case Jacket
- Some data will not update until the next release. Always check Case Management for the most recent bond and estate value information.



Case Information			
Docket Number	JP Name	Report type	Status
p-12377	Alfred Butler	Inventory	New Report Draft
Judgment Date	Filed Date	Initial Estate Value	Current Net Estate Value
09/01/2017	12/28/2009	\$956,756	\$956,756
Bond Amount	Transaction ID		
\$2,000	GMP2020289		
<b>Quick Links</b>			
<a href="#">Case Jacket</a>	<a href="#">Inventory</a>		

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## Work Screens

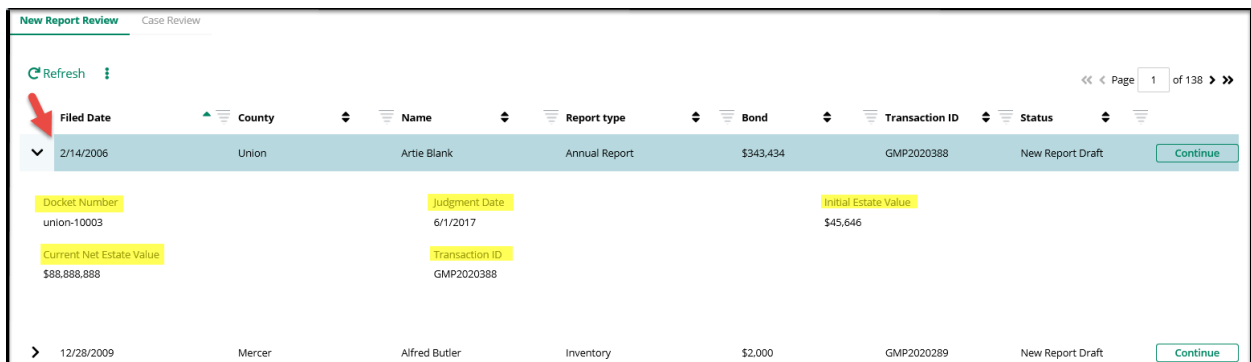
A review is opened by clicking 'Begin' for a new review or 'Continue' for a review that has been saved as a draft.



Filed Date	County	Name	Report type	Bond	Transaction ID	Status	
> 2/9/2010	Mercer	Alfred Butler	Inventory	\$2,000	GMP2020283	New Report Draft	<a href="#">Continue</a>
> 3/6/2012	Mercer	Alfred Butler	EZ Accounting	\$2,000	GMP2020285	New Report	<a href="#">Begin</a>
> 12/18/2012	Mercer	Alfred Butler	Annual Report	\$2,000	GMP2020288	New Report	<a href="#">Begin</a>

Clicking the twisty will open additional details about the case:

- Docket Number
- Judgment Date
- Initial Estate Value
  - Note: the initial release has limited data syncing, so updates to this field will only display in the review where the update was made, and not in other reviews for the same docket number.
- Current Net Estate Value
  - Note: the initial release has limited data syncing, so updates to this field will only display in the review where the update was made, and not in other reviews for the same docket number.
- Transaction ID



Filed Date	County	Name	Report type	Bond	Transaction ID	Status	
> 2/14/2006	Union	Artie Blank	Annual Report	\$343,434	GMP2020388	New Report Draft	<a href="#">Continue</a>

**Docket Number**  
union-10003

**Judgment Date**  
6/1/2017

**Initial Estate Value**  
\$45,646

**Current Net Estate Value**  
\$88,888,888

**Transaction ID**  
GMP2020388

> 12/28/2009	Mercer	Alfred Butler	Inventory	\$2,000	GMP2020289	New Report Draft	<a href="#">Continue</a>
--------------	--------	---------------	-----------	---------	------------	------------------	--------------------------

Once open, each review has a Case Information section, with a link to the Case Jacket of the particular case:

Case Information			
Docket Number	IP Name	Report type	Status
p-12377	Alfred Butler	EZ Accounting	New Report
Judgment Date	Filed Date	Initial Estate Value	Current Net Estate Value
09/01/2017	03/06/2012	\$956,756	\$956,756
Bond Amount	Transaction ID		
\$2,000	GMP2020285		
<b>Quick Links</b>			
<a href="#">Case Jacket</a>   EZ Accounting			

The review section:

- Questions are tailored to either an Inventory or a Periodic Report
- Issues are tailored to the specific report
- Permits users to indicate that issues are 'Emergent'

For questions where there is only 1 issue, that issue will default as selected:

Home EZ Accounting ×

Answer all questions below based on comparison to the inventory or the prior year's reporting.

1. Is the reporting period correct?  Yes  No

Emergent?

Issues  
Reporting period incorre... × Clear

Comment/Explanation  
 Comment/Explanation  
 Remaining: 150 characters

Note: users can click the "x" and de-select the issue, but an error message will display and prohibit the submission of the review.

For questions where there are multiple issues, users select at least one issue from the dropdown menu:

4. Do the income and disbursements appear accurate and consistent with the judgment, other orders, and any prior reports?  Yes  No

Emergent?

Issues  
Select Issue(s) Clear

Comment/Explanation  
 Comment/Explanation  
 Remaining: 150 characters

- Summary - Beginning Cash Balance
- Summary - Schedule A-EZ: Income
- Summary - Schedule B-EZ: Disbursements
- Summary - Schedule B-4: All Other Disbursements
- Assets - Schedule A: Real Property
- Assets - Schedule B: Stocks, Bonds
- Assets - Schedule C: Money on Hand, Bank Accounts, CDs
- Assets - Schedule D: Pension, Retirement Accounts
- Assets - Schedule E: Misc Personal Property

For questions with sub-questions, if 'No' is selected to any sub-question, the issues list will display. All sub-questions must be answered.

8. Was any change in ownership of assets reported?

A . Was this change reported as income or disbursements?  Yes  No

B . Was this change consistent with the judgment or other orders?  Yes  No

Emergent?

Issues  
 Clear

Comment/Explanation

Remaining: 150 characters

The 'Net Estate Value' entered at upload of the report displays in the review, and this field can be updated:

14. Enter Net Estate Value (NEV)

Note: as stated above, an update here will only display in this review, and in Case Management. Other open reviews for the same docket number will not update in this roll-out.

The update will display in the Estate Value table in Case Management as a correction:

▼ Estate Value Initial Estate Value: \$ 15,800 Current Net Estate Value: \$ 19,000

Initial Estate Value:

Date	Estate Value	Action	Entered By
02/20/2020	\$19,000	Correction: EZ Accounting Report GMP202018314	susan.flynn
02/20/2020	\$18,900	EZ Accounting Report	susan.flynn
02/20/2020	\$14,000	EZ Accounting Report	susan.flynn
06/12/2019	\$15,800	Inventory Report	susan.flynn
02/06/2019	\$15,900	Case Initiation Documents	susan.flynn

If there are any issues identified in the review, the 'Additional Review Required?' question displays:

If any issues are identified as 'Emergent', the question defaults to 'Yes' being selected:



A screenshot of a form question titled "Additional Review Required?". On the right side, there are two radio buttons: "Yes" (which is selected, indicated by a blue dot) and "No" (which is unselected, indicated by a grey dot).

If issues are identified, but none are 'Emergent', then the user selects 'Yes' or 'No'. If 'Yes' is selected, the user must enter a comment/explanation:



A screenshot of a form question titled "Additional Review Required?". On the right side, there are two radio buttons: "Yes" (selected) and "No" (unselected). Below the question, there is a text input field labeled "Comments" with a placeholder text "Comment/Explanation". At the bottom left of the input field, it says "Remaining: 150 characters".

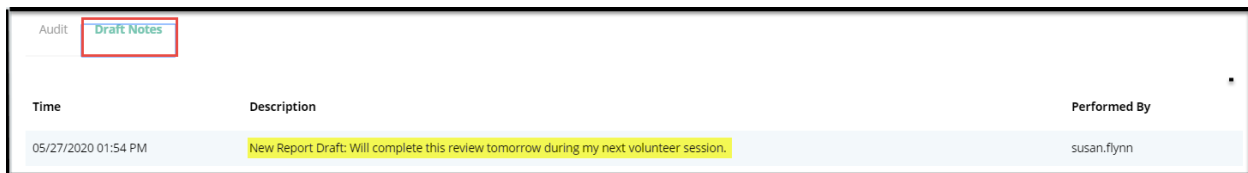
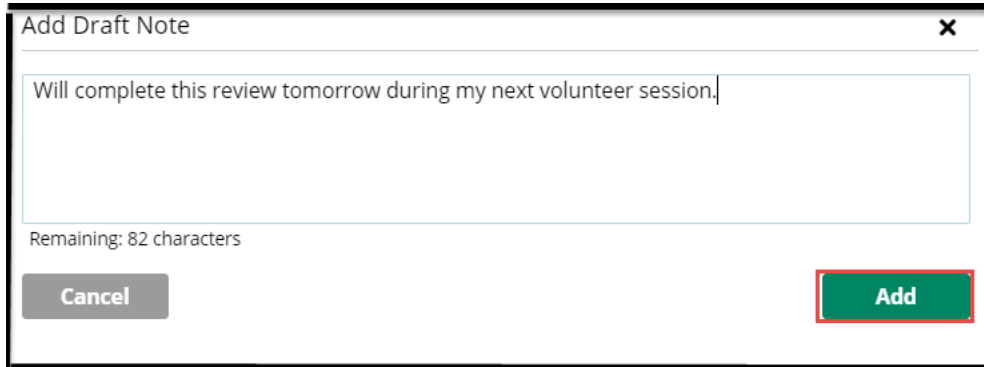
When all questions have been completed, the user can click 'Save' to save the review as a draft or click 'Next' to proceed to a read only screen.



A screenshot of a button bar containing three buttons: "Cancel" (grey), "Save" (grey), and "Next" (green).

Saving as draft:

- Click 'Save'
- Enter a comment
- The comment will save in 'Draft Notes'

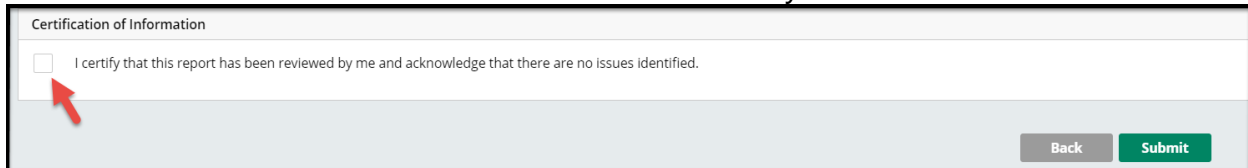


Time	Description	Performed By
05/27/2020 01:54 PM	New Report Draft: Will complete this review tomorrow during my next volunteer session.	susan.flynn

Clicking 'Next'

- User proceeds to a read-only screen to review the work completed
- If edits need to be made, the user clicks 'Back' to return to the work screen
- If the review is ready for final submission, the user clicks 'Submit'
- For reviews with no issues identified, a Certification of Information displays and must be checked before the review can be submitted

If no issues are found in the review, the user must certify:



Note: this certification appears only in the read-only version of the review and must be completed before the user can click 'Submit'.

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## Review Summary PDF

Upon submission of a review, a success message displays and the Transaction ID for the PDF posted to the Case Jacket is provided:

Review submitted.
⊗

Case Information			
Docket Number	IP Name	Report type	Status
2020-23	Rose Richards	EZ Accounting	Pending Final Review
Judgment Date	Filed Date	Initial Estate Value	Current Net Estate Value
02/19/2019	02/20/2020	\$15,800	\$19,000
Bond Amount	Transaction ID		
\$0	GMP202018314		

Case jacket has been updated with a report summary, transaction ID GMP202018316

Close

The PDF appears in the Case Jacket with a link to the report reviewed:

**Docket Number: 2020-23**

Back
Create Summary Report

**IP Name:** ROSE RICHARDS      **Venue:** BURLINGTON      **Court Type:** GUARDIANSHIP  
**Filed Date:** 02/06/2019      **Case Status:** ACTIVE      **Case Type:**  
**Guardianship Type:** PERSON GENERAL (PLENARY) - ESTATE GENERAL (PLENARY)      **Judgment Date:** 02/19/2019      **Judge:** HON. REPORT JUDGE, SR.

**IP** Others (2)

▶ ROSE RICHARDS      Party Type: INCAPACITATED PERSON      Party Status :ACTIVE

Case Actions Search:

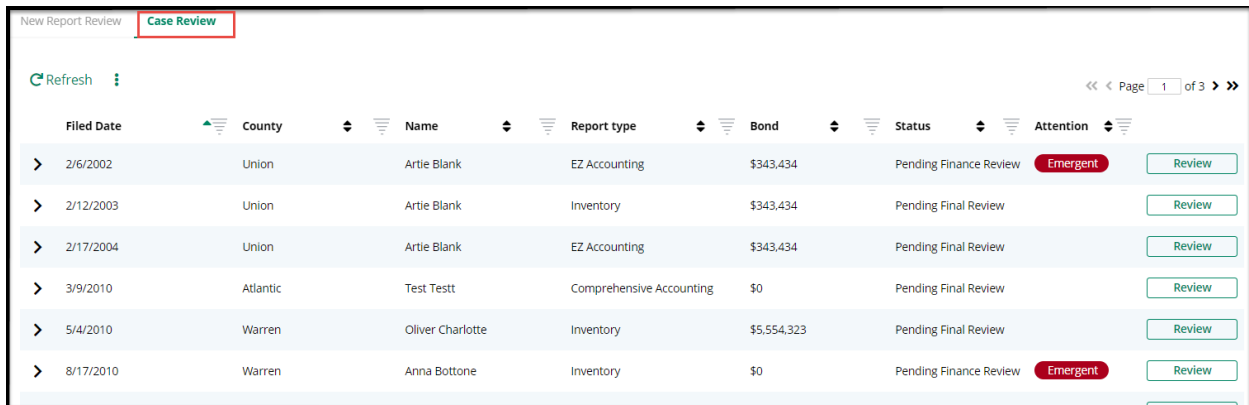
Filing Date	Filings	Docket Text	Transaction ID	Entry Date	Entered By
02/06/2019		Case Initiation Documents	GMP2020953	03/24/2020	susan.flynn
02/22/2019		Qualification Documents	GMP2020955	03/24/2020	susan.flynn
06/12/2019		Inventory Report	GMP2020954	03/24/2020	susan.flynn
02/20/2020		EZ Accounting Report	GMP202018313	05/27/2020	susan.flynn
02/20/2020		Report Review - New Report Review RE: EZ Accounting <a href="#">[GMP202018314]</a>	GMP202018316	05/27/2020	susan.flynn
02/20/2020		EZ Accounting Report	GMP202018314	05/27/2020	susan.flynn
03/24/2020		Overdue Notice	GMP20201009	03/24/2020	System-Generated

The review has now moved to the Case Reviewer workbasket, and will no longer display in the New Report Review workbasket.

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## Case Review Workbasket

- Columns:
  - Filed Date = stamped filed date
  - County
  - Name
  - Report type
  - Bond
  - Status
    - 'Pending Finance Review' = a review with emergent issues OR a review identified as requiring additional review
    - 'Pending Final Review' = a review with no issues OR a review identified as not requiring additional review
  - Attention
    - If an issue has been identified as 'Emergent' by a volunteer, the indicator will appear in the Attention column
- Actions: Case Reviewers have a read-only view. The only action button is 'Review'
- Twisties: the twisties expand just as they do in the New Report Review workbasket



The screenshot displays the 'Case Review' workbasket interface. At the top, there is a 'Refresh' button and a page indicator showing 'Page 1 of 3'. The table below lists several review items with the following columns: Filed Date, County, Name, Report type, Bond, Status, Attention, and a 'Review' button. The 'Attention' column contains a red 'Emergent' indicator for the first and last rows.

Filed Date	County	Name	Report type	Bond	Status	Attention	Review
> 2/6/2002	Union	Artie Blank	EZ Accounting	\$343,434	Pending Finance Review	Emergent	Review
> 2/12/2003	Union	Artie Blank	Inventory	\$343,434	Pending Final Review		Review
> 2/17/2004	Union	Artie Blank	EZ Accounting	\$343,434	Pending Final Review		Review
> 3/9/2010	Atlantic	Test Test	Comprehensive Accounting	\$0	Pending Final Review		Review
> 5/4/2010	Warren	Oliver Charlotte	Inventory	\$5,554,323	Pending Final Review		Review
> 8/17/2010	Warren	Anna Bottone	Inventory	\$0	Pending Finance Review	Emergent	Review



Upon clicking 'Review':

- Case Reviewers have a read only view of the volunteer review results.
- The 'Close' button closes the screen, it does not close or complete the review.
- The review will remain in the workbasket in the same status
- If Finance completes a review, the work will be done offline and a record will need to be kept outside of the system

New Report Review Results	
1. Is the reporting period correct?	Yes
2. Is the correct reporting form used?	Yes
3. Does the report contain all required information?	Yes
4. Is the information reported consistent with the income/assets/liabilities/encumbrances reported in the Certification of Assets?	Yes
5. Do the liabilities/encumbrances match the IP's condition and residential arrangement?	Yes
6. Based on the current estate value, is the bond amount appropriate?	Yes
7. Based on the current estate value and the guardian's relationship with the IP, are the guardian reporting requirements appropriate?	Yes
8. Based on this report, should the guardian's appointment be reviewed?	No
9. Are there other areas of concern?	No
10. Are there mathematical errors in the report?	No
11. Enter Net Estate Value (NEV)	\$88,888.888


[Close](#)

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# eCourts Guardianship – Civil Release Notes

3/09/2020




## New Document Types – Upload Documents Screen

	<p>There are now separate document types for Subsequent Orders and Amended Judgments. For more information, click <a href="#">here</a>.</p>
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## Amended Judgment Process – Upload Document tab

	<p>A new process to capture Amended Judgments has been added. Amended Judgments will be added via the Upload Document tab. For more information, click <a href="#">here</a>.</p>
	<p>Users will be able to add new guardians via the Upload Document tab. For more information, click <a href="#">here</a>.</p>

## Amended Judgment Process – Case Management tab

	<p>Users will be able to update the guardian profiles if new Qualification Documents are required to be filed. For more information, click <a href="#">here</a>.</p>
	<p>Several new fields have been added to Case Management to support the Amended Judgment process. For more information, click <a href="#">here</a>.</p>
	<p>The frequency field has been enhanced to display as a drop-down menu. For more information, click <a href="#">here</a>.</p>

# Estate Value Section

	A new Estate Value section has been added to Case Management. For more information, click <a href="#">here</a> .
	The values displayed in the Estate Value section will be captured at the upload of certain documents and reports. For more information, click <a href="#">here</a> .

## New Document Types – Upload Documents Screen

'Subsequent Order' and 'Amended Judgment' are now separate document types.

**NOTE:** Refer to the caption of the document for guidance in selecting the appropriate document type. Typically, an Amended Judgment makes changes to some or all of the following: 1) guardian (adding or removing); 2) guardianship type; 3) reporting requirements.

The screenshot shows the 'Upload Documents' screen in the Judiciary eCourts System - Guardianship. The 'UPLOAD DOCUMENT' tab is highlighted in red. A dropdown menu is open, showing document types: Case Initiation Documents, Judgment, Qualification Documents, Inventory Report, Well-Being Report, SS Representative Payee Report, EZ Accounting Report, Comprehensive Accounting Report, Annual Report, Amended Judgment, Subsequent Order, New Report Review Results, Finance Review Results, and Other. A red arrow points to 'Subsequent Order'. The 'Document Type' field is empty, and a 'Browse...' button is visible.


To upload a Subsequent Order, enter: 1) 'Filed Date'; 2) Judge Name; 3) select the document by clicking browse; 4) click 'Continue'.

The screenshot shows the 'Upload Documents' screen in the Judiciary eCourts System - Guardianship. The 'UPLOAD DOCUMENT' tab is highlighted in blue. The 'Document Type' field is set to 'Subsequent Order'. The 'Filed Date' field is empty, the 'Judge Name' field is empty, and the 'Browse...' button is visible. The 'Continue' button is highlighted in red.

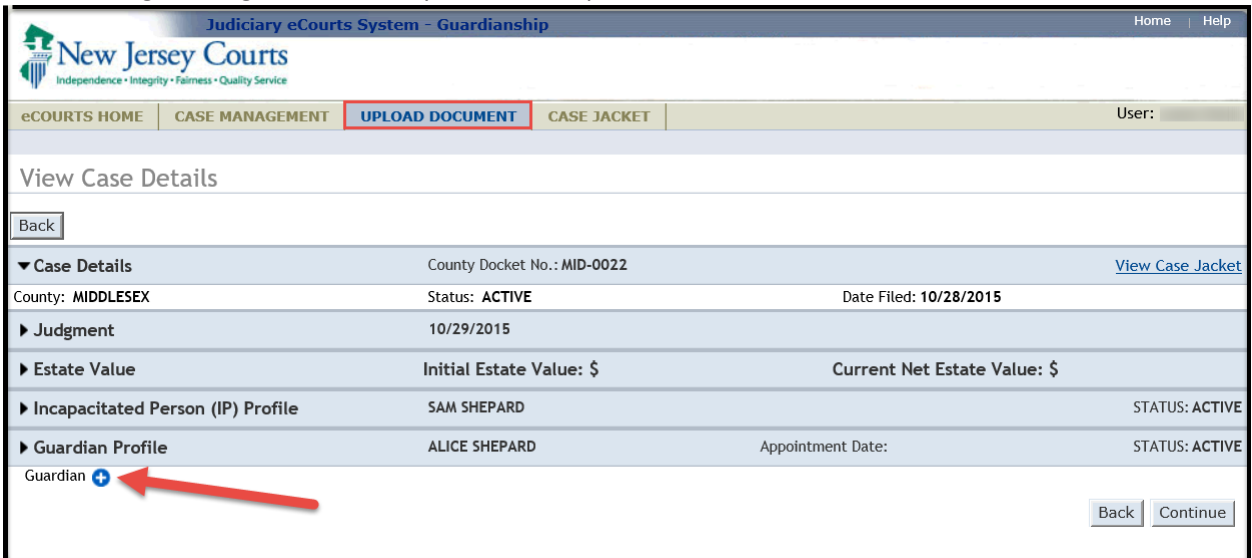
[\(Back\)](#)

## Amended Judgment Process – Upload Document tab

There is a new procedure for entry of an Amended Judgment and for adding a new guardian appointed in the Amended Judgment using the Upload Document tab.

1. If the Amended Judgment appoints 1 or more new guardians, click the Guardian  icon.

**NOTE:** If a new guardian is appointed in an amended judgment, then adding that guardian at upload becomes part of the normal workflow. However, the Guardian + icon will display and allow adding a new guardian for any document uploaded.




Judiciary eCourts System - Guardianship

New Jersey Courts  
Independence • Integrity • Fairness • Quality Service

eCOURTS HOME CASE MANAGEMENT **UPLOAD DOCUMENT** CASE JACKET User: [ ]

View Case Details

Back

▼ Case Details	County Docket No.: MID-0022	<a href="#">View Case Jacket</a>
County: MIDDLESEX	Status: ACTIVE	Date Filed: 10/28/2015
▶ Judgment	10/29/2015	
▶ Estate Value	Initial Estate Value: \$	Current Net Estate Value: \$
▶ Incapacitated Person (IP) Profile	SAM SHEPARD	STATUS: ACTIVE
▶ Guardian Profile	ALICE SHEPARD	Appointment Date: STATUS: ACTIVE
Guardian 		

Back Continue

2. Select the type of name to search by and click 'Continue'.



Judiciary eCourts System - Guardianship

New Jersey Courts  
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eCOURTS HOME CASE MANAGEMENT **UPLOAD DOCUMENT** CASE JACKET User: susan.flynn

Search for Guardian

Back

▼ Case Details	County Docket No.: MER2017-26	<a href="#">View Case Jacket</a>
County: MERCER	Status: ACTIVE	Date Filed: 03/01/2017
▶ Judgment	03/08/2017	
▶ Incapacitated Person (IP) Profile	SHARON SHELL	STATUS: ACTIVE
▶ IP Attorney Profile	LLOYD STEPHEN BRAUN	STATUS: ACTIVE
▶ Guardian Profile	RICHARD RICHARDS	Appointment Date: 03/06/2019 STATUS: ACTIVE
▼ Guardian Profile		

\* Search By:

Back Continue

3. Enter the 'Guardian First Name' and 'Guardian Last Name', then click 'Search'.
  - a. If a match is found, a list of Search Results will display. Confirm the results shown and select the guardian, if applicable, and click 'Continue' to proceed to the Guardian Profile.

**NOTE:** This step is to ensure that a duplicate guardian record is not created. Additional searches can be performed, by clicking the reset button and entering new search criteria.

Judiciary eCourts System - Guardianship

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QA - Internal

eCOURTS HOME CASE MANAGEMENT UPLOAD DOCUMENT CASE JACKET User: Sabrina.LewisAllen

Search for Guardian

Back

▼ Case Details County Docket No.: MER2017-26 [View Case Jacket](#)

County: MERCER Status: ACTIVE Date Filed: 03/01/2017

► Judgment 03/08/2017

► Incapacitated Person (IP) Profile SHARON SHELL STATUS: ACTIVE

► IP Attorney Profile LLOYD STEPHEN BRAUN STATUS: ACTIVE

► Guardian Profile RICHARD RICHARDS Appointment Date: 03/06/2019 STATUS: ACTIVE

► Guardian Profile MANNY MORSE Appointment Date: STATUS: ACTIVE

▼ Guardian Profile

\* Search By: Party Name ▼ \* Guardian First Name: Susan \* Guardian Last Name: Flynn Reset Search

Search Results

Select	Party Name	Address	Phone 1	DOB	NJ Attorney ID
<input checked="" type="radio"/>	Susan Flynn	COURT ST HAMILTON 55443			

Back Add New Guardian Continue

- b. If no match is found, click 'Add New Guardian' to create a new guardian record and proceed to the Guardian Profile.

Judiciary eCourts System - Guardianship

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QA - Internal

eCOURTS HOME CASE MANAGEMENT UPLOAD DOCUMENT CASE JACKET User:

Search for Guardian

Back

✘ No parties found.

▼ Case Details County Docket No.: MER2017-26 [View Case Jacket](#)

County: MERCER Status: ACTIVE Date Filed: 03/01/2017

► Judgment 03/08/2017

► Incapacitated Person (IP) Profile SHARON SHELL STATUS: ACTIVE

► IP Attorney Profile LLOYD STEPHEN BRAUN STATUS: ACTIVE

► Guardian Profile RICHARD RICHARDS Appointment Date: 03/06/2019 STATUS: ACTIVE

▼ Guardian Profile

\* Search By: Party Name ▼ \* Guardian First Name: Manny \* Guardian Last Name: Morse Reset Search

Back Add New Guardian Continue

- c. Complete the guardian profile(s)
  - i. 'New Qualification Required?' will default to checked. The check will automatically clear when Qualification Documents are uploaded.
  - ii. If Qualification Documents are not timely uploaded, an overdue notice will be sent.
- d. Click 'Continue' to navigate to the Upload Documents screen
- e. **NOTE:** The guardian(s) are not saved at this point, so if you exit before uploading a document, the guardian profile data entered will be lost

**▼ Guardian Profile**

\*Party Type:  Appointment Date:

\*First Name:  Middle name:  \*Last Name:  Suffix:

Alias

\* Qualification Required?:  (Noticing will occur based on most recent Judgment Date value.)

\* Is the Guardian an Attorney?:  Yes  No

\*Address Line 1:  Address Line 2:

\*City:  \*State:  \*Zip Code:

Phone 1:  Phone 2:

Email Address 1:  Email Address 2:

Social Security Number:    Date of Birth:  Relationship to IP:

Gender:

Interpreter Needed?:  Yes  No

Additional Profile Info:

**Judiciary eCourts System - Guardianship** Home | Help

**New Jersey Courts**  
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eCOURTS HOME | CASE MANAGEMENT | **UPLOAD DOCUMENT** | CASE JACKET | User:

---

**Add New Guardian**

✔ Added New Guardian successfully

<b>▼ Case Details</b>		County Docket No.: MER2017-26	<a href="#">View Case Jacket</a>
County: MERCER	Status: ACTIVE	Date Filed: 03/01/2017	
▶ Judgment	03/08/2017		
▶ Incapacitated Person (IP) Profile	SHARON SHELL	STATUS: ACTIVE	
▶ IP Attorney Profile	LLOYD STEPHEN BRAUN	STATUS: ACTIVE	
▶ Guardian Profile	RICHARD RICHARDS	Appointment Date: 03/06/2019	STATUS: ACTIVE
▶ Guardian Profile	MANNY MORSE	Appointment Date:	STATUS: ACTIVE

Guardian

4. If the Amended Judgment does not appoint a new guardian, simply click 'Continue' to navigate to the Upload Documents screen
  
5. To upload an Amended Judgment, select 'Amended Judgment' from the document type dropdown. **NOTE:** It is important to select the correct document type for noticing and Case Management purposes. Do not use any other document type for an Amended Judgment.
  - a. 'Filed Date' is the stamped filed date
  - b. 'Supplemental Inventory Required?' – check the Amended Judgment to determine whether it directs the guardian to file an Inventory Report. Select 'Yes' or 'No', as appropriate.
  - c. 'Noticing Date' – check the Amended Judgment to determine which date will be used for purposes of calculating the due dates for any required reports. The 'Noticing Date' will always be either the 'Initial Judgment Date' or the 'Amended Judgment Date'.
    - i. **NOTE:** The automatic overdue notices sent when a required report is not uploaded will be sent out based on the date selected in the 'Noticing Date' field.
  - d. Upload the Amended Judgment and click 'Continue'
  - e. Follow the screen instructions to complete the upload

Judiciary eCourts System - Guardianship Home | Help  
**New Jersey Courts**  
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eCOURTS HOME | CASE MANAGEMENT | **UPLOAD DOCUMENT** | CASE JACKET User:

### Upload Documents

[Back](#)  
✔ Amended Judgment uploaded successfully

▼ Case Details County Docket No.: MER2017-26 [View Case Jacket](#)

**Documents Due:**  
 Documents listed below are either missing or overdue, and therefore need to be uploaded.
 

- Qualification Documents from Guardian MORSE, MANNY

**Select Document Type**

+	* Document Type: Amended Judgment	* Filed Date: 02/05/2020	* Supplemental Inventory Required?: <input checked="" type="radio"/> Yes <input type="radio"/> No	* Noticing Date: 02/05/2020-Amended Jux	AMENDED JUDGMENT.pdf
---	--------------------------------------	-----------------------------	--	--	----------------------

[Back](#) [Continue](#)



6. Once all details have been confirmed, click 'Submit'.

Judiciary eCourts System - Guardianship Home Help

New Jersey Courts  
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eCOURTS HOME CASE MANAGEMENT **UPLOAD DOCUMENT** CASE JACKET User:

Review/Submit Filing

Back

▼ Case Details County Docket No.: MER2017-26 [View Case Jacket](#)

County: MERCER Status: ACTIVE Date Filed: 03/01/2017

Upload Documents

• Amended Judgment [AMENDED JUDGMENT.pdf](#)

Back Submit

7. Click 'Yes' in the Submit Filing pop-up to complete the upload.

**Submit Filing**

Review ALL information and documents for accuracy prior to submitting the filing. Once submitted, documents will be included in the case jacket.

Yes No

8. When the upload of the Amended Judgment is complete, the newly added guardian(s) will be saved
9. If an existing guardian must file new Qualification Documents as a result of the Amended Judgment, proceed to Case Management to update the guardian profile


Home | Help


**Judiciary eCourts System - Guardianship**

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eCOURTS HOME | CASE MANAGEMENT | **UPLOAD DOCUMENT** | CASE JACKET | User: \_\_\_\_\_

Confirmation

 Request processed successfully

**Update profile in Case Management if new qualifications are required for an existing guardian.** 

▼ Case Details County Docket No.: MER2017-26 [View Case Jacket](#)

County: MERCER Status: ACTIVE Date Filed: 03/01/2017

Transaction Information

Documents	Filed Date	Date Submitted	Transaction ID
Amended Judgment	02/05/2020	02/11/2020	GMP2020301

[\(Back\)](#)

## Amended Judgment Process – Case Management tab

1. If an existing guardian must file new Qualification Documents, open the 'Guardian Profile' twisty in Case Management, check the 'New Qualification Required?' box and click 'Save'
  - a. If Qualification Documents are uploaded for that guardian, the checkbox will automatically clear
  - b. If Qualification Documents are not uploaded within 45 days, an overdue notice will be sent out

▼ Guardian Profile		DELIA DELL	Appointment Date:	STATUS: ACTIVE
* Party Type:	Guardian of Person and Estate ▼			Party Action: ACTIVE ▼
* First Name:	delia	Middle name:		* Last Name: dell
Alias +		Appointment Date:		Suffix: ▼
* New Qualification Required?: <input type="checkbox"/> (Noticing will occur based on most recent Judgment Date value.)				
* Is the Guardian an Attorney?: <input type="radio"/> Yes <input checked="" type="radio"/> No				
* Address Line 1:	N Street	Address Line 2:		
* City:	Trenton	* State:	NJ ▼	* Zip Code: 08625 ZIP
Phone 1:		Phone 2:		
Email Address 1:		Email Address 2:		
Social Security Number:		Date of Birth:		Relationship to IP: Friend ▼
Gender:	Female ▼			
Interpreter Needed?: <input type="radio"/> Yes <input type="radio"/> No				
Additional Profile Info: <input type="text"/>				
				Cancel Save

2. New fields added when an amended judgment has been uploaded that are populated automatically based on the data entered at upload of the amended judgment
  - a. 'Amended Judgment Date'
  - b. 'Supplemental Inventory Required'
  - c. 'Noticing Date'
  
3. Changes to the following fields can only be made by your county Program Coordinator:
  - a. 'Initial Judgment Date' (this is a change)
  - b. 'Amended Judgment Date'
  - c. 'Noticing Date'

**▼ Judgment** 11/06/2018

* Initial Judgment Date: <input type="text" value="11/06/2018"/>	* Verified Complaint Filed Date: <input type="text" value="10/01/2018"/>	Amended Judgment Date: <input type="text" value="01/01/2020"/> (Most recent)
* Inventory Required: <input checked="" type="radio"/> Yes <input type="radio"/> No		
* Guardianship Type: <input checked="" type="checkbox"/> Person <input checked="" type="radio"/> General (Plenary) OR <input type="radio"/> Limited <input checked="" type="checkbox"/> Estate <input checked="" type="radio"/> General (Plenary) OR <input type="radio"/> Limited		
* Annual Report?: <input type="radio"/> Yes <input checked="" type="radio"/> No <span style="color: blue; font-size: small;">Primarily used for backloading.</span>		
* Well-Being Report?: <input checked="" type="radio"/> Yes <input type="radio"/> No Frequency (Months): <input type="text" value="Other"/> <input type="text" value="1"/>		
* Accounting?: <input checked="" type="radio"/> Yes <input type="radio"/> No		
* EZ Accounting?: <input checked="" type="radio"/> Yes <input type="radio"/> No Frequency (Months): <input type="text" value="12"/>		
* SS Representative Payee Report?: <input type="radio"/> Yes <input checked="" type="radio"/> No		
* Comprehensive Accounting?: <input type="radio"/> Yes <input checked="" type="radio"/> No		
* Bond Required?: <input type="radio"/> Yes <input checked="" type="radio"/> No		
* Amended Bond?: <input type="radio"/> Yes <input checked="" type="radio"/> No		
* Guardian(s) Limitations?: <input checked="" type="radio"/> Yes <input type="radio"/> No <span style="color: orange; font-size: small;">Click Ctrl + Left Click to select multiple entries</span>		
<div style="border: 1px solid #ccc; padding: 2px; font-size: x-small;"> <span style="color: blue;">Guardian(s) of Estate may not alienate, mortgage, transfer or otherwise encumber or dispose of real property without court approval.</span>            The OPG, with court approval, may sell any interest in real property owned by IP.            Limited Guardian(s) of Person with respect to medical decisions that require informed consent, legal advice, and residential decisions.            Guardianship of the property is limited to _____.            Other         </div>		
* Firearms Rights Retained?: <input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> Undetermined		
* Other Rights Retained?: <input type="radio"/> Yes <input checked="" type="radio"/> No		
* Judge Name: <input type="text" value="JOHN J COYLE JR"/> (Select the most recent judge to issue an order in this case.)		
Judgment Comments: <input style="width: 100%; height: 20px;" type="text"/>		

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## Amended Judgment – Frequency Field

Select the correct frequency from the drop-down menu or select 'Other' and enter the frequency if it is not displayed.

**Judgment** 03/06/2018

\* Initial Judgment Date:  \* Verified Complaint Filed Date:

\* Inventory Required:  Yes  No

\* Guardianship Type:  Person  General (Plenary) OR  Limited  
 Estate  General (Plenary) OR  Limited

\* Annual Report?:  Yes  No Primarily used for backloading.

\* Well-Being Report?:  Yes  No Frequency (Months):

\* Accounting?:  Yes  No

\* EZ Accounting?:  Yes  No

\* SS Representative Payee Report?:  Yes  No

\* Comprehensive Accounting?:  Yes  No

\* Bond Required?:  Yes  No

\* Amended Bond?:  Yes  No

Frequency (Months):

- 3
- 6
- 12
- 18
- 24
- 36
- 60
- Other

[\(Back\)](#)

## Estate Value Section – Case Management

This section tracks the value of the Guardianship Estate over time.

Initial Estate Value = the value of the Estate at the beginning of the case

Current Net Estate Value = the value of the Estate reported by the guardian in the periodic reports

Judiciary eCourts System - Guardianship Home | Help

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eCOURTS HOME | **CASE MANAGEMENT** | UPLOAD DOCUMENT | CASE JACKET | User: \_\_\_\_\_

Case Search | Report Review

Manage Case

▼ Case Details County Docket No.: cp-0888-2018 [View Case Jacket](#)

County: ESSEX Status: ACTIVE Date Filed: 02/02/2018

► Judgment 03/06/2018

▼ Estate Value Initial Estate Value: \$ 2,000 Current Net Estate Value: \$ 12,000

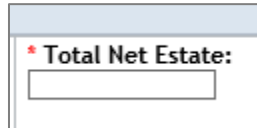
Initial Estate Value: 2,000

Date	Estate Value	% Change	Action	Entered By
03/06/2019	\$12,000	500	EZ Accounting Report	susan.flynn
06/04/2018	\$2,000	1900	Inventory Report	susan.flynn
02/02/2018	\$100	N/A	Case Initiation Documents	susan.flynn

[\(Back\)](#)

## Estate Values – Upload Document

A new required field has been added to the Upload Documents screen:



A screenshot of a form field. The field is labeled with the text "\* Total Net Estate:" in a bold, black font. Below the label is a rectangular input box with a thin border. The entire field is enclosed in a light blue header bar.

The Estate Values will be captured at the upload of:

- Case Initiation Documents (refer to Certification of Assets attached to the Verified Complaint)
- Inventory Report
- Annual Report
- EZ Accounting Report
- Comprehensive Accounting Report
- SS Representative Payee Report

The values entered on the Upload Documents screen will auto-populate the Estate Value Section in Case Management.

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# eCourts Guardianship – Civil Release Notes

12/05/19

## Upload Document

New

Two new document types have been added to the 'Document Type' drop down menu on the 'Upload Documents' screen. For more information, click [here](#).

## Upload Document

Two new document types have been added to the 'Document Type' drop down menu on the 'Upload Documents' screen: 1) 'New Report Review Results'; and 2) 'Finance Review Results'. These new document types are only for use to upload paper report review results.

- 1) Select the document type; 2) enter the appropriate 'Description'; 3) record the date the review was completed; 4) attach the PDF; 5) click 'Continue'. Please contact Civil Practice for guidelines relating to the use of these new document types.

Judiciary eCourts System - Guardianship

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eCOURTS HOME CASE MANAGEMENT **UPLOAD DOCUMENT** CASE JACKET User:

### Upload Documents

Back

▼ Case Details County Docket No.: p-609-2018 [View Case Jacket](#)

Documents Due:  
There are no documents missing or overdue at this time.

Select Document Type

\* Document Type:  
Case Initiation Documents  
Judgment  
Qualification Documents  
Inventory Report  
Well-Being Report  
SS Representative Payee Report  
EZ Accounting Report  
Comprehensive Accounting Report  
Annual Report  
Subsequent Order  
**New Report Review Results**  
**Finance Review Results**  
Other

Browse...

Back Continue

Screen ID: 14

Judiciary eCourts System - Guardianship

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eCOURTS HOME CASE MANAGEMENT **UPLOAD DOCUMENT** CASE JACKET User:

### Upload Documents

Back

▼ Case Details County Docket No.: p-609-2018 [View Case Jacket](#)

Documents Due:  
There are no documents missing or overdue at this time.

Select Document Type

\* Document Type:  
New Report Review Results

\* Description:


\* Review Completed:

Browse...

Back Continue



The docket text for documents uploaded using the new document types will display in the case jacket as shown below. The 'Filing Date' reflects the 'Review Completed' date entered on the 'Upload Documents' screen.

Filing Date	Filings	Docket Text	Transaction ID	Entry Date	Entered By
12/02/2019		New Report Review Results-EZ Accounting - Trans ID GMP2018555	GMP20196339	12/05/2019	

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# eCourts Guardianship – Civil Release Notes

11/01/19

## New Messages and Fixes

New	An informational message has been added to clarify the entry of dollar figures in all relevant fields. For more information, click <a href="#">here</a> .
New	An informational message has been added to remind users that once a case has been saved, the 'County Docket Number' field cannot be modified. For more information, click <a href="#">here</a> .
New	Additional validations have been added to the 'County Docket Number' field to prohibit the addition of special characters aside from a dash ("-"). For more information, click <a href="#">here</a> .
New	A specific "Document file size cannot exceed 7MB" error message will display if a document is too large to be uploaded to Case Jacket. For more information, click <a href="#">here</a> .
New	An informational message has been added to the 'Documents Due' list in Case Jacket to remind users to upload Qualification Documents separately in order to avoid overdue notices from being incorrectly issued to guardians. For more information, click <a href="#">here</a> .
Fixed	The Blue Stamp for documents uploaded to the Case Jacket has been updated to include the county code. For more information, click <a href="#">here</a> .
Fixed	Semicolons and colons are now permitted in the 'Description of Other' text box for the 'Guardian Limitations' field in Case Management. Entry of these characters will no longer cause an error message. For more information, click <a href="#">here</a> .
Fixed	Users will no longer be able to access cases outside their assigned county or counties. For more information, click <a href="#">here</a> .

## Only Whole Numbers Allowed in Dollar Fields

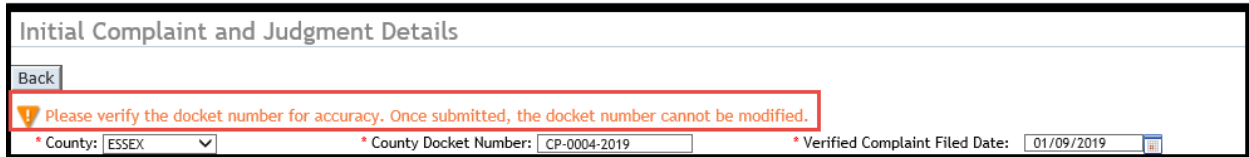
An instruction has been added to clarify that only whole numbers (no cents or commas) should be entered into dollar fields. The system will add the appropriate separators.

eCOURTS HOME	CASE MANAGEMENT	UPLOAD DOCUMENT	CASE JACKET	User:	
<b>Initial Complaint and Judgment Details</b>					
<a href="#">Back</a>					
⚠ Please verify the docket number for accuracy. Once submitted, the docket number cannot be modified.					
* County:	ESSEX	* County Docket Number:	CP-0004-2019	* Verified Complaint Filed Date:	01/09/2019
<b>▼ Judgment</b>					
* Initial Judgment Date:	06/04/2019				
* Guardianship Type:	<input checked="" type="checkbox"/> Person <input type="checkbox"/> General (Plenary) OR <input type="checkbox"/> Limited <input checked="" type="checkbox"/> Estate <input type="checkbox"/> General (Plenary) OR <input type="checkbox"/> Limited				
* Inventory Required:	<input type="radio"/> Yes <input type="radio"/> No				
* Annual Report?:	<input type="radio"/> Yes <input checked="" type="radio"/> No <a href="#">Primarily used for backloading.</a>				
* Well-Being Report?:	<input checked="" type="radio"/> Yes <input type="radio"/> No Frequency (Months): 12				
* Accounting?:	<input checked="" type="radio"/> Yes <input type="radio"/> No				
* EZ Accounting?:	<input type="radio"/> Yes <input type="radio"/> No Frequency (Months): 12				
* SS Representative Payee Report?:	<input type="radio"/> Yes <input checked="" type="radio"/> No				
* Comprehensive Accounting?:	<input type="radio"/> Yes <input checked="" type="radio"/> No				
* Bond Required?:	<input checked="" type="radio"/> Yes <input type="radio"/> No				
* Initial Bond \$:	10,000				
Date of Bond:	06/04/2019				
Bond Company:	RLI				
* Guardian(s) Limitations?:	<input checked="" type="radio"/> Yes <input type="radio"/> No				
Guardian(s) of Estate may not alienate, mortgage, transfer or otherwise encumber or dispose of real property without court approval. The OPG, with court approval, may sell any interest in real property owned by IP. Limited Guardian(s) of Person with respect to medical decisions that require informed consent, legal advice, and residential decisions. Guardianship of the property is limited to Other					
<a href="#">Click Ctrl + Left Click to select multiple entries</a>					
* Limitation \$:	5,000				

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## County Docket Number Field Cannot be Modified

Once a case has been created/saved, the 'County Docket Number' field cannot be edited. This is an informational message to remind users to verify the accuracy of the date entered in the field prior to saving the case.

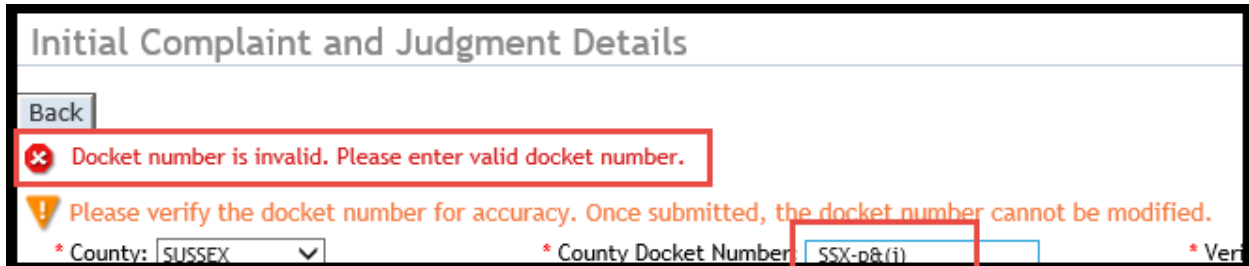


The screenshot shows a form titled "Initial Complaint and Judgment Details". At the top left is a "Back" button. Below it is a red-bordered warning box containing a yellow triangle icon and the text: "Please verify the docket number for accuracy. Once submitted, the docket number cannot be modified." Below the warning box are three fields: "County" with a dropdown menu showing "ESSEX", "County Docket Number" with a text input field containing "CP-0004-2019", and "Verified Complaint Filed Date" with a date picker showing "01/09/2019".

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## Additional Validations Added to County Docket Number Field

Only dashes ("-") can be added to the 'County Docket Number' field. Other special characters will generate an error message.

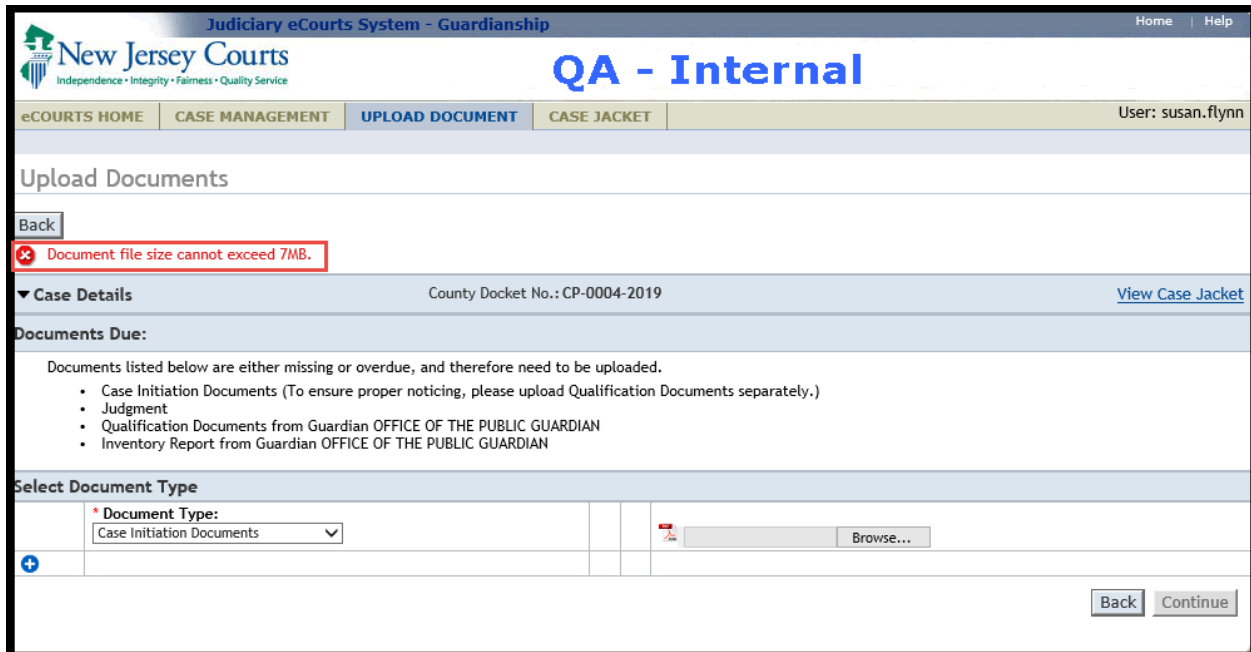


The screenshot shows the same form as above, but with a red-bordered error box at the top containing a red 'x' icon and the text: "Docket number is invalid. Please enter valid docket number." Below this is the same warning box as in the previous screenshot. The "County" dropdown now shows "SUSSEX". The "County Docket Number" text input field contains "SSX-p&(i)", which is highlighted with a red box. The "Verified Complaint Filed Date" field is partially visible on the right.

[\(Back\)](#)

## New Error Message Added If Document Exceeds 7MB Size Limitation

A specific error message will now display if a document exceeds the 7MB file size limitation.



The screenshot displays the 'Judiciary eCourts System - Guardianship' interface. At the top, there is a navigation bar with 'eCOURTS HOME', 'CASE MANAGEMENT', 'UPLOAD DOCUMENT', and 'CASE JACKET' tabs. The user is identified as 'susan.flynn'. The main heading is 'QA - Internal'. Below this, there is a section for 'Upload Documents' with a 'Back' button. A red-bordered error message box states: 'Document file size cannot exceed 7MB.' Below the error message, there is a 'Case Details' section for 'County Docket No.: CP-0004-2019' with a 'View Case Jacket' link. The 'Documents Due' section lists several document types: Case Initiation Documents, Judgment, Qualification Documents from Guardian OFFICE OF THE PUBLIC GUARDIAN, and Inventory Report from Guardian OFFICE OF THE PUBLIC GUARDIAN. The 'Select Document Type' section features a dropdown menu set to 'Case Initiation Documents' and a 'Browse...' button. At the bottom right, there are 'Back' and 'Continue' buttons.

[\(Back\)](#)

## Informational Message Added to the Documents Due List on the Upload Documents Screen

An informational message has been added to the Documents Due List on the Upload Documents screen as a reminder that Qualification Documents must be uploaded separately under the 'Qualification Documents' document type in order to ensure proper noticing. If Qualification Documents are uploaded as part of Case Initiation Documents, an overdue notice will be issued to the affected guardian(s).

Judiciary eCourts System - Guardianship Home Help

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eCOURTS HOME CASE MANAGEMENT **UPLOAD DOCUMENT** CASE JACKET User:

### Upload Documents

Back

▼ Case Details County Docket No.: SSX-P-7878 [View Case Jacket](#)

**Documents Due:**

Documents listed below are either missing or overdue, and therefore need to be uploaded.

- Case Initiation Documents (To ensure proper noticing, please upload Qualification Documents separately.)
  - Judgment

**Select Document Type**

\* Document Type:  Browse...

+


Back Continue

[\(Back\)](#)

The Blue Stamp for Uploaded Documents Now Contains a County Code  
 For ease of reference, the appropriate County Code has been added to all Blue Stamps on uploaded documents.

CONFIDENTIAL (ESX) CP-0004-2019 10/30/2019 3:32:08 PM Pg 1 of 3 Trans ID: GMP20196252

CONFIDENTIAL (ESX) CP-0004-2019 10/30/2019 3:32:08 PM Pg 1 of 3 Trans ID: GMP20196252



**Filing Attorney Information or Pro Se Litigant:**  
 Name \_\_\_\_\_  
 NJ Attorney ID Number \_\_\_\_\_  
 Law Firm/Agency Name \_\_\_\_\_  
 Address \_\_\_\_\_  
 Telephone Number \_\_\_\_\_

*In the Matter of:*  
 \_\_\_\_\_  
 an Incapacitated Person

Superior Court of New Jersey  
 Chancery Division - Probate Part  
 \_\_\_\_\_ County  
 Docket No. \_\_\_\_\_

**Civil Action**  
**Judgment of Incapacity and**  
**Appointment of Guardian(s) of the**  
**Person and Estate**

---

**THIS MATTER** being opened to the Court by \_\_\_\_\_, plaintiff(s), by and through his/her attorney, \_\_\_\_\_ in the presence of \_\_\_\_\_, attorney for the then alleged incapacitated person, and \_\_\_\_\_, the then alleged incapacitated person, and no demand having been made for a jury trial, and the Court sitting without a jury having found from the report of counsel together with the report of the examining physician or psychologist and other supporting document and proofs given that \_\_\_\_\_ is an incapacitated person who lacks sufficient capacity to govern himself/herself or to manage his/her affairs, and it further appearing that \_\_\_\_\_, consents to serve as Guardian(s) of the Person and Estate (Property) of \_\_\_\_\_, and for good cause shown:

IT IS on this \_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, **ORDERED AND ADJUDGED** that:

1. **GUARDIANSHIP TYPE:** \_\_\_\_\_ is an incapacitated person and is unfit and unable to govern himself/herself and manage his/her affairs. This is a guardianship:

As to the Person  General  Limited  
 As to the Estate  General  Limited

**Limited Guardianship:** The incapacitated person is able at this time to govern himself/herself and manage his/her own affairs with respect to the following areas:  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Check if applicable:  
 The subject of this guardianship is incapacitated as a result of developmental disability.

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## Semicolons & Colons Permitted in 'Description of Other' Text Box

The 'Description of Other' text box that opens in the 'Guardian(s) Limitations?' field in the Judgment twisty in Case Management now permits the entry of semicolons and colons and an error message will no longer be generated when these characters are used.

The screenshot shows a web form titled "Judgment" with a date of "06/04/2019". The form contains several sections with radio buttons and checkboxes for various options. The "Guardian(s) Limitations?" section is expanded, showing a list of options: "Guardian(s) of Estate may not alienate, mortgage, transfer or otherwise encumber or dispose of real property without court approval.", "The OPG, with court approval, may sell any interest in real property owned by IP.", "Limited Guardian(s) of Person with respect to medical decisions that require informed consent, legal advice, and residential decisions.", "Guardianship of the property is limited to \_\_\_\_.", and "Other". Below this list, there is a text input field for "Limitation \$:" with the value "5,000". The "Description of Other:" field is highlighted with a red box and contains the text "Semi colons; and colons: allowed in this field".

**Judgment** 06/04/2019

\* Initial Judgment Date: 06/04/2019 \* Verified Complaint Filed Date: 01/09/2019

\* Guardianship Type:  Person  General (Plenary) OR  Limited  
 Estate  General (Plenary) OR  Limited

\* Inventory Required:  Yes  No

\* Annual Report?:  Yes  No *Primarily used for backloading.*

\* Well-Being Report?:  Yes  No Frequency (Months): 12

\* Accounting?:  Yes  No

\* EZ Accounting?:  Yes  No Frequency (Months): 12

\* SS Representative Payee Report?:  Yes  No

\* Comprehensive Accounting?:  Yes  No

\* Bond Required?:  Yes  No \* Initial Bond \$: 10,000 Date of Bond: 06/04/2019 Bond Company: RLI

\* Amended Bond?:  Yes  No

\* Guardian(s) Limitations?:  Yes  No

*Click Ctrl + Left Click to select multiple entries*

Guardian(s) of Estate may not alienate, mortgage, transfer or otherwise encumber or dispose of real property without court approval.  
The OPG, with court approval, may sell any interest in real property owned by IP.  
Limited Guardian(s) of Person with respect to medical decisions that require informed consent, legal advice, and residential decisions.  
Guardianship of the property is limited to \_\_\_\_.  
Other

Enter whole numbers - for example: 10000.

\* Limitation \$: \$ 5,000

\* Description of Other: Semi colons; and colons: allowed in this field

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## Users Are Able to Access Only Those Cases Within Their Assigned County

A fix has been implemented so that users will only be able to access those cases that are appropriate based on their security access parameters.

If only 1 case is returned in search results, and that case is not within the user's assigned county/counties, a message will display. (NOTE: this message will display in Case Management beginning on November 1, 2019. Beginning on November 9, 2019, the message will also display in Upload Document.)

The results are the same for docket number and name searches. New message:

The screenshot shows the 'New Jersey Courts' logo and navigation tabs: 'eCOURTS HOME', 'CASE MANAGEMENT', 'UPLOAD DOCUMENT', and 'CASE JACKET'. The 'CASE MANAGEMENT' tab is active. Below the navigation is a 'Case Search' section with the heading 'Manage Case'. A red-bordered message box contains the text: 'You are not authorized to open this case because it is outside your assigned county.' Below the message are two search options: 'Search for County Docket Number (exact):' with a text input field containing 'p-7777-2018' and a 'Search' button; and 'Search for Incapacitated Person:' with 'First Name' and 'Last Name' input fields, a 'Reset' button, and a 'Search' button.

Previously, if a user's search netted 1 result and the case was outside the user's security access, a 'No case found.' message displayed. The new message is meant to be more helpful and user friendly. Prior message:

The screenshot shows the same 'New Jersey Courts' interface as above. The 'CASE MANAGEMENT' tab is active. Below the navigation is a 'Case Search' section with the heading 'Manage Case'. A red-bordered message box contains the text: 'No case found.' Below the message are two search options: 'Search for County Docket Number (exact):' with an empty text input field and a 'Search' button; and 'Search for Incapacitated Person:' with 'First Name' (containing 'alice') and 'Last Name' (containing 'blanchard') input fields, a 'Reset' button, and a 'Search' button.

[\(Back\)](#)

## Users Are Able to Access Only Those Cases Within Their Assigned County con't

If a search nets multiple results, all results will display but the user will be able to access only those cases within their assigned county/counties:

Judiciary eCourts System - Guardianship My Account Home Help Logout

New Jersey Courts  
Independence • Integrity • Fairness • Quality Service

eCOURTS HOME **CASE MANAGEMENT** UPLOAD DOCUMENT CASE JACKET User: \_\_\_\_\_

Case Search

### Manage Case

Only alphabetic characters can be entered in name fields.

Search for County Docket Number (exact): \* atl-100

OR

Search for Incapacitated Person: \* First Name  \* Last Name

**Search Results**

Select	County	County Docket #	IP First Name	IP Middle Name	IP Last Name	Filed Date	DOB	Case Status
<input type="radio"/>	CAMDEN	ATL-100	JERMEY		WHITE <a href="#">Alias</a>	05/02/2013	10/10/1967	ACTIVE
<input checked="" type="radio"/>	MIDDLESEX	ATL-100	NOV FIRST		NOV LAST <a href="#">Alias</a>	09/09/2014	09/16/1980	ACTIVE
<input type="radio"/>	ATLANTIC	ATL-100	MICHAEL		SCOTT	11/10/2015	07/15/1997	ACTIVE
<input type="radio"/>	ATLANTIC	ATL-100	JENNA		JONES	01/11/2016		ACTIVE
<input type="radio"/>	ATLANTIC	ATL-100	MIKE		SMITH	01/20/2016		ACTIVE
<input type="radio"/>	ATLANTIC	ATL-100	MILLA		SMITH	01/13/2016		ACTIVE
<input type="radio"/>	ATLANTIC	ATL-100	UJA		CARTER	01/13/2016		ACTIVE
<input type="radio"/>	ATLANTIC	ATL-100	EREWRWER		REEWREWR	01/13/2016		ACTIVE
<input type="radio"/>	ATLANTIC	ATL-100	ERER		RERER	01/13/2016		ACTIVE

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# eCourts Guardianship – Civil Release Notes

11/01/19

Login

New

The Judiciary has upgraded to an enterprise single sign on (ESSO). External Users will now see a new landing page after logging in to applications. For more information, click [here](#).

## ESSO

External users will enter User ID and Password, as usual. The external URL for eCourts Guardianship will not change.

### 1. Login screen – this screen will remain the same:

**NJ Courts**  
Independence • Integrity • Fairness • Quality Service

NJCourts | Request Activation Email | Request User ID Information | Reset Password

## Login

Enter your User ID and Password.  
If you have been provided with a temporary password, login below.

User ID:

Password:

Effective August 13, 2018, the Judiciary requires all external users accessing attorney registration, eCourts, eCDR, eTRO, eJOC, eVNF, EM, MACS, and DVCR, to reset their password through password synchronization or "p-synch". P-synch will be available to users of these applications as of August 13, 2018. All users must update their password through p-synch no later than October 15, 2018 to avoid disruption in accessing the Judiciary's applications. [Click here for P-synch.](#)

Additionally, user will be required to select and answer personal security questions to assist in recovering passwords remotely. Should you have any questions, please contact the Superior Court Clerk's Office at 609-421-6100.

For [Login Help](#), click "Reset Password" or to request information about your existing ID click "Request User ID Information".

**Internet Explorer Version Issue:** There is a known issue with Internet Explorer Version 11 running on Windows 10 which is causing users to attempt to login multiple times unsuccessfully. If you encounter this issue, please use another browser (e.g., Chrome, Microsoft Edge, Safari, Firefox).

If you are receiving "Authentication Failed" error message after logging in, please perform the following steps in order to reset your password:

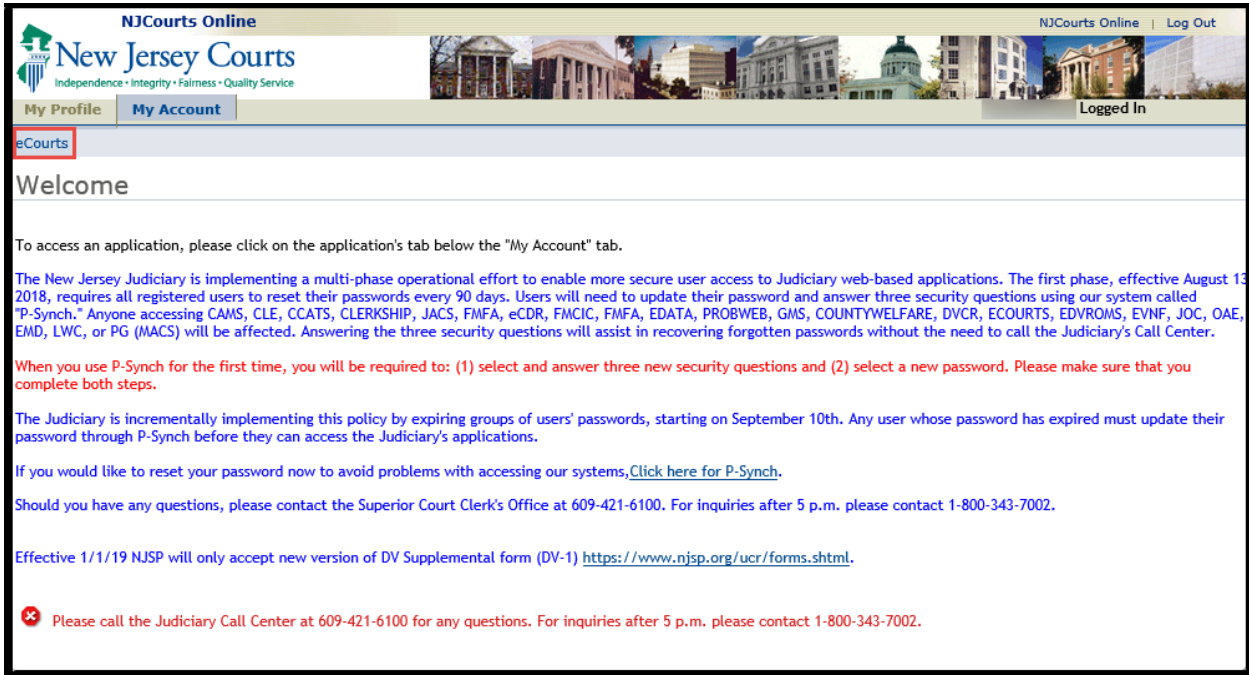
1. Click the **Reset Password** button
2. Answer the security questions when prompted
3. An email will be sent to the email address used to activate the account
4. Open the email and follow the instructions

If you are still not able to successfully login after resetting your password, please contact the Help Desk at 1-800-343-7002 and someone will assist you.

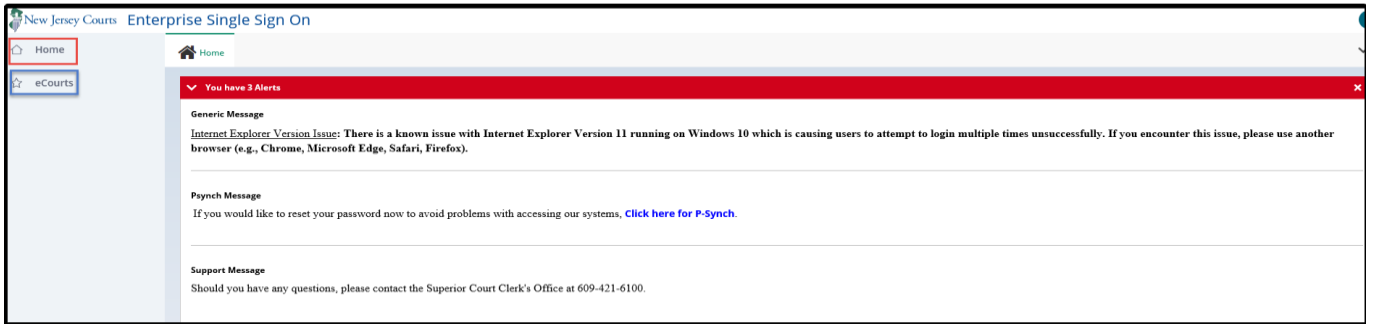
[\(Back\)](#)

2. Home Screen - this screen will be changing:

2a. Current home screen:



2b. New Home Screen: All navigation tabs are on the left.



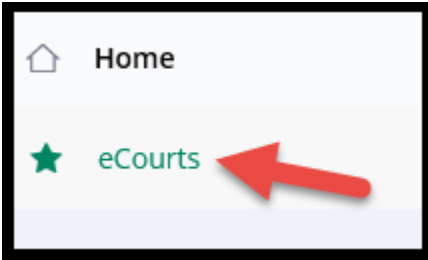
[\(Back\)](#)

**3. Accessing Applications:**

**3a. Current:** Click on the tab to open the application.




**3b. New:** Click on the application title and it will open as usual.



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4. Remaining screens: The Verification and Welcome Screens remain the same:

Judiciary eCourts System - Guardianship My Account | Home | Help | Logout

 **New Jersey Courts**  
Independence • Integrity • Fairness • Quality Service

User: \_\_\_\_\_

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Judiciary Help Desk: 609-421-6100  
eCourts Support: 8:00 AM - 5:00 PM Normal Business Days

### Verify Information and Enter Email Address

**eFiling Contact Information**

Please verify the following information to begin electronic filing.  
Please review or edit, if necessary, the email addresses for electronic notification. All filing correspondence and notification will be sent to email addresses provided.  
To return to Registration & Contact Information, please click 'My Account' above.

Agency Name and Address *	Email Addresses for Electronic Notifications
25 Market St. Trenton, NJ 08625	* Email 1 <input type="text"/> Email 2 <input type="text"/> Email 3 <input type="text"/>

**Certification of Information**

I certify that all of this information is true and accurate.

Judiciary eCourts System - Guardianship My Account | Home | Help | Logout

 **New Jersey Courts**  
Independence • Integrity • Fairness • Quality Service

**eCOURTS HOME** | CASE MANAGEMENT | UPLOAD DOCUMENT | CASE JACKET User: \_\_\_\_\_

---

### Welcome to eCourts

Select Court/Division:

**eCourts Support and Contact Info**  
Judiciary Help Desk: 609-421-6100  
eCourts Support: 8:00 AM - 5:00 PM Normal Business Days  
Need help? Check out our [training materials](#) and [FAQ](#)

**Announcements**

There are no announcements.

To Return to Verify Agency and Email Screen click "Back"

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# eCourts Guardianship – Civil Release Notes

5/10/19

## Upload Document

<b>New</b>	The gender field is now required when creating a new case. For more information, click <a href="#">here</a> .
<b>Fixed</b>	For all cases created prior to gender being made a mandatory field, the gender selection will be updated to 'Unknown' if no selection was made at the time of case creation. For more information, click <a href="#">here</a> .



## Gender Field Now Required in Case Creation

Gender is a required field on the 'Add Incapacitated Person' screen when creating a new case in the Upload Document tab. The 'Continue' button on the bottom right of the screen will not become enabled until a selection is made.

**Judiciary eCourts System - Guardianship** Home | Help

**New Jersey Courts**  
Independence • Integrity • Fairness • Quality Service

eCOURTS HOME CASE MANAGEMENT **UPLOAD DOCUMENT** CASE JACKET User:

### Add Incapacitated Person

[Back](#)

▼ **Case Details** County Docket No.: CP-0900-2019 [View Case Jacket](#)

County: ESSEX Status: ACTIVE Date Filed: 04/02/2019

▶ **Judgment** 04/30/2019

▼ **Incapacitated Person (IP) Profile**

\* First Name: Sally Middle Name: Last Name: Smith Suffix: ▼

Alias + Phone +

Home Address:

\* Address Line 1: Address Line 2:

\* City: State: NJ Zip Code: ZIP

\* Current Residential Arrangement: ▼

\* Current Residence same as Home Address?:  Yes  No

Click Ctrl + Left Click to select multiple entries

\* Disability: 

- Alcohol/Substance Abuse Induced Dementia
- Alzheimer/Dementia
- Chronic Mental Illness
- Developmental Disability
- Head Trauma
- Physical Infirmary
- Stroke/Vascular Dementia/CVA
- Other
- Cannot Determine

Social Security Number: Date of Birth:

\* Gender:  Marital Status: ▼

Additional Profile Info:


[Back](#) [Continue](#)

[\(Back\)](#)

## Updated Gender Field in Cases Created Prior to 5/10/19

For cases created prior to gender selection being mandatory, gender will be updated to 'Unknown' if no selection was made when the case was created.

Judiciary eCourts System - Guardianship Home | Help

 Independence • Integrity • Fairness • Quality Service

eCOURTS HOME | CASE MANAGEMENT | **UPLOAD DOCUMENT** | CASE JACKET | User:

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### View Case Details

[Back](#)

▼ Case Details	County Docket No.: wrn-0003	<a href="#">View Case Jacket</a>
County: WARREN	Status: ACTIVE	Date Filed: 05/16/2017
▶ Judgment	06/02/2017	
▼ Incapacitated Person (IP) Profile	ANNA BOTTONE	STATUS: ACTIVE

\* First Name:  Middle Name:  \* Last Name:  Suffix:

Home Address:

\* Address Line 1:  Address Line 2:

\* City:  State:  \* Zip Code:

\* Current Residential Arrangement:

\* Current Residence same as Home Address?:  Yes  No

\* Disability:

Social Security Number:    Date of Birth:

**Gender:**  Unknown Marital Status:

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