

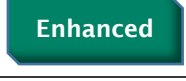



# eCourts Guardianship Report Review – Civil Release Notes 05/13/2022

## 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> .

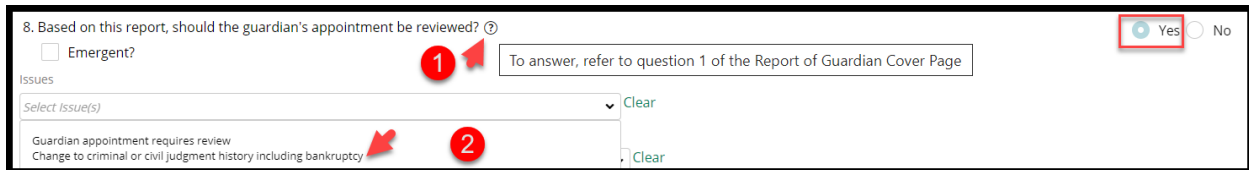
## New Issue in Report Review

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?

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

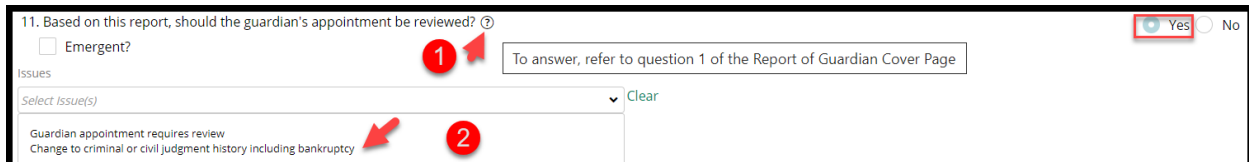
Issues

Select Issue(s) Clear

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

Red arrows point to the question number '8', the 'To answer, refer to question 1 of the Report of Guardian Cover Page' text box, and the new issue 'Change to criminal or civil judgment history including bankruptcy' in the dropdown menu.

### Periodic Reports:



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

Emergent?

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

Issues

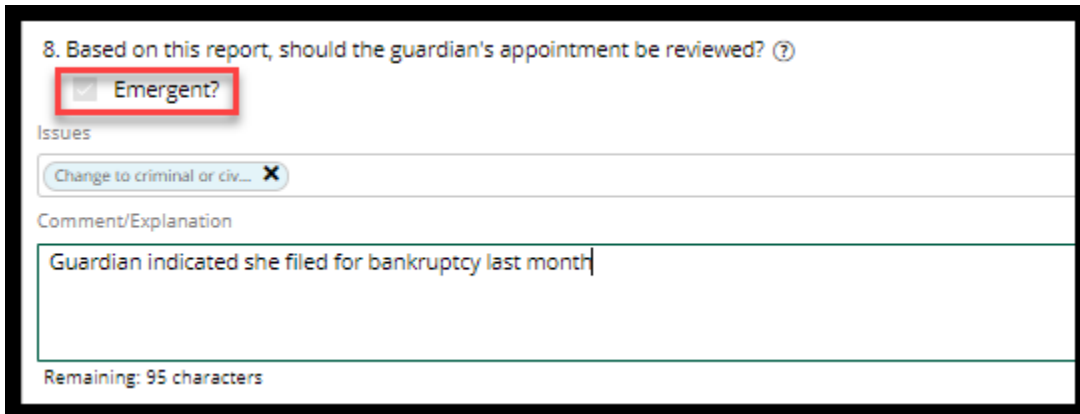
Select Issue(s) Clear

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

Red arrows point to the question number '11', the 'To answer, refer to question 1 of the Report of Guardian Cover Page' text box, and the new issue 'Change to criminal or civil judgment history including bankruptcy' 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

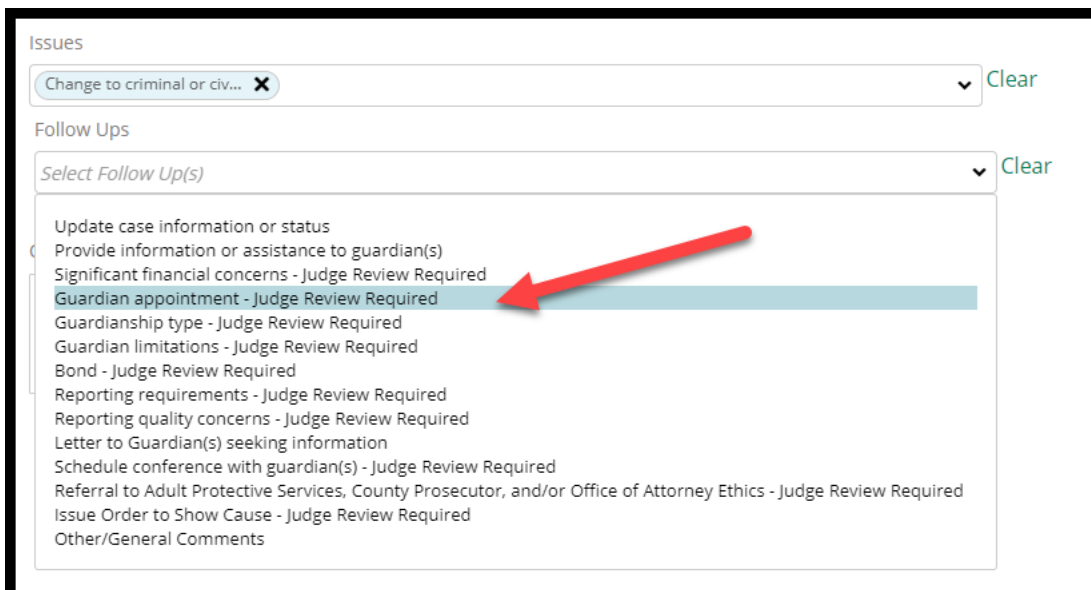
Change to criminal or civ... X

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... X 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 contains the following elements:

- A 'Search by:' section with '+ Add/Change' and 'Reset All' buttons.
- A 'Refresh' button with a circular arrow icon.
- A table with columns: 'Filed Date', 'County', 'Docket Number', and 'Report type'. The table contains several rows of data.
- A search criteria dropdown menu with 'Issues' selected.
- A 'IssuesPresent' section with 'Yes' and 'No' radio buttons.
- '+ Add Search Criteria', 'Cancel', 'Reset', and 'Search' buttons.

Red circles with numbers 1 through 4 are overlaid on the interface to indicate the steps: 1 on the 'Add/Change' button, 2 on the 'Issues' dropdown, 3 on the 'No' radio button, and 4 on the 'Search' button.

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

The screenshot shows the 'Case Review' tab with search filters applied. The search criteria are 'IssuesPresent: No' and 'Review Status: Pending Final Review'. The results table shows two entries:

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	<a href="#">Begin</a>
11/24/2021	Mercer	20-88772	EZ Accounting	13,132	Pending Final Review	<a href="#">Begin</a>

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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' interface. At the top, there are tabs for 'Judge Review', 'Finance Review', and 'New Report Review'. The 'Judge Review' tab is active and highlighted with a red box. Below the tabs, the section is titled 'Judge Review' 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 teal message box that says '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'. Below that is a 'Comment/Explanation' text area containing 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'. Another red arrow points to the right side of the teal message box.

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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		Pending Follow-Ups	Emergent <span>Begin</span>

- 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)

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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