

eCourts Guardianship

Case Creation September 2021

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Minimum Information Required

The **minimum** required information for case creation:

- IP Name
- IP Home Address
- County & Docket Number
- Initial Judgment Date
- Guardian Name and Address

Required Information	Where to Locate Information	Workaround
IP Name	<ul style="list-style-type: none"> • Judgment (preferred) • Other pleading • Qualification Documents Reports 	None
IP Home Address	<ul style="list-style-type: none"> • Verified Complaint • Report of Court Appointed Attorney • Report of Guardian Cover Page 	Use the guardian's address and enter a comment in 'Additional Profile Info' field
County and Docket Number	<ul style="list-style-type: none"> • Judgment • Other pleadings 	None
Initial Judgment Date	<ul style="list-style-type: none"> • Judgment • Qualification Documents • Subsequent Verified Complaint or judgment (initial judgment date may be recited in the pleadings or attached as an exhibit) • Reports 	<p>If these documents are missing, or the subsequent pleadings are silent on the initial judgment date → Initial Judgment Date = 1 day after filed date of original Verified Complaint</p> <p>If there is no original Verified Complaint → Initial Judgment Date = 1 day prior to subsequent judgment date</p> <p>If none of these situations → none</p>
Guardian Name and Address	<ul style="list-style-type: none"> • Judgment • Qualification Documents • Reports and related correspondence • Verified Complaint • Report of Court Appointed Attorney 	<p>If no name → none</p> <p>If name but no address → enter "unknown" in address fields, all zeros for zip code & enter a comment in 'Additional Profile Info'</p> <p>If no name or address → none</p>

Where to Find Information

This table can assist in locating information for case creation.

Field	Where to Find Information	Workaround
Verified Complaint Filed Date	- Verified Complaint - If there is a subsequent Verified Complaint and/or judgment/order, the original Verified Complaint may be attached as an exhibit or referred to within the subsequent pleading	Date = 1 day prior to judgment date
Guardianship Type	- Judgment - Reporting	If the documents are silent → Select 'General' for 'Person' and 'Estate' & enter a comment in 'Judgment Comments'
Reporting requirements	-Judgment	If there is no judgment or the judgment is silent → Select 'No' for all report types & enter a comment in 'Judgment Comments' If there is a subsequent judgment → enter the information contained in that judgment
Bond	-Judgment -Qualification Documents	If there is no judgment or qualifications or the documents are silent → Select 'No' & enter a comment in 'Judgment Comments'
Guardian Limitations	-Judgment -Qualification Documents	If there is no judgment or qualifications or the documents are silent → Select 'No' & enter a comment in 'Judgment Comments'
Firearms Rights	-Judgment	If there is no judgment or the judgment is silent → Select 'Undetermined' & enter a comment in 'Judgment Comments'
Other Rights Retained	-Judgment	If there is no judgment or the judgment is silent → Select 'No' & enter a comment in 'Judgment Comments'
Judge Name	-Judgment	If there is no judgment → Select 'Not Listed'
IP Disability	-Verified Complaint -Report of Court Appointed Attorney	If documents are missing or silent → Select 'Cannot Determine' & enter a comment in 'Additional Profile Info' field
IP Gender	-Verified Complaint -Report of Court Appointed Attorney	If documents are missing or silent → Select 'Unknown' & enter a comment in 'Additional Profile Info' field
IP Attorney	-Order for Hearing -Report of Court Appointed Attorney & related correspondence	If name is available, use the Attorney Index search for Bar ID If no name is available, enter Caitlin Hohenstein, Esq. Select 'Yes' for 'Discharged'

Process

Click on the 'Upload Document' tab and select 'New Case'

The system will prompt for the entry of the name of the Incapacitated Person (IP) to check whether a case already exists:

- 1) Enter the name of the Incapacitated Person (IP)
- 2) Click 'Search'
- 3) If no case exists, a message displays
- 4) Click 'Continue'

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

Search for an Existing Case

Only alphabetic characters can be entered in name fields.

Enter a New Case/File on an Existing Case

Search for County Docket Number (exact): *

OR

Search for Incapacitated Person: * First Name * Last Name

OR

Enter a new case:

Search for an Incapacitated Person to ensure the case does not already exist

Only alphabetic characters can be entered in name fields.

✘ No case found. 3

Incapacitated Person: * First Name 1 * Last Name 2

4

If the IP name is in the system, the cases will display in 'Search Results'.

To continue to create a new case, click 'Continue'.

Search for an Incapacitated Person to ensure the case does not already exist

Only alphabetic characters can be entered in name fields.


Incapacitated Person: * First Name * Last Name

Search Results							
County	County Docket #	IP First Name	IP Middle Name	IP Last Name	Filed Date	DOB	Case Status
MERCER	P890116	JOHN		WELLS <small>Alias</small>	07/21/1998	09/15/1968	CLOSED
BERGEN	P-7777-2018	JOHN		WELLS	06/03/2018	07/27/1972	ACTIVE

Initial Complaint and Judgment Details

- 1) Select the county
- 2) Enter the eCourts docket number
- 3) Enter the stamped Filed Date on the Verified Complaint
- 4) Enter details found in the Judgment of Incapacity and Appointment of Guardian(s)

Note: Once a case is saved, the docket number cannot be changed. Cases with incorrect docket numbers must be deleted and re-entered.

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

1 * County: * County Docket Number: 2 * Verified Complaint Filed Date: 3

▼ Judgment 4

* Initial Judgment Date:

* 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

* 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: (Select the most recent judge to issue an order in this case.)

Judgment Comments:

Initial Judgment Date is the stamped Filed Date

Guardianship Type: **See** Paragraph 1 of the Model Judgment of Incapacity and Appointment of Guardian(s) of the Person and Estate (the "Model Judgment").

Reporting Fields:

Select the required reports, if any as well as the reporting frequency.

To find reporting requirements, **see** Model Judgment paragraphs:

- 8 → Inventory Report
- 9 → Well-Being Report
- 10 → Accounting Report type

Annual Reports are the old form of report in use prior to 2015. Do not select this unless you are sure it is the correct report type.

* Initial Judgment Date:

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

Note: Clicking 'General' will automatically populate the corresponding 'Person' and 'Estate' boxes.

* Inventory Required: Yes No

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

* Well-Being Report?: Yes No

* Accounting?: Yes No

Frequency (Months):

- 3
- 6
- 12
- 18
- 24
- 36
- 60
- Other

Example: A report due annually has a frequency of 12 months.

NOTE: The overdue notices sent to guardians are based on the information captured in these fields, so it is important that this information is accurate.

Bond information is found in Paragraph 2 of the Model Judgment. If no bond is ordered, select 'No'.

Guardian limitations are located in Paragraph 5 of the Model Judgment, otherwise select 'No'.

Firearms rights: The answer is almost always no; however, see Paragraph 1 of the Model Judgment.

If there are other rights retained, they will be set forth with specificity in the judgment. Otherwise, select 'No'.

Select the judge who signed the most recent judgment.

If needed, enter additional information in 'Judgment Comments'.

Enter whole numbers - for example: 10000

* Bond Required?: Yes No * Initial Bond \$: Date of Bond: Bond Company:

* Guardian(s) Limitations?: Yes 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 decision. Guardianship of the property is limited to ____.

Other

Click Ctrl + Left Click to select multiple entries

* Firearms Rights Retained?: Yes No Undetermined

* Other Rights Retained?: Yes No

Right to Vote.
Right to Marry.
Right to Drive.
Right to choose leisure activities.
Right to handle money.
All rights except for those medical decisions affected by a limited guardianship of the person.
Other


* Judge Name: (Select the most recent judge to issue an order in this case.)

Tip: Enter the first few initials of the judge's first name to locate him/her in the dropdown.

Judgment Comments:

When all the information has been entered, click 'Continue'.

Note: The 'Continue' button will not be enabled if any required information is missing.

* Initial Judgment Date:	<input type="text" value="07/23/2020"/>	* Verified Complaint Filed Date:	<input type="text" value="05/13/2020"/>
* Inventory Required:	<input checked="" type="radio"/> Yes <input type="radio"/> No		
* Guardianship Type:	<input checked="" type="checkbox"/> Person <input type="radio"/> General (Plenary) OR <input type="radio"/> Limited <input checked="" type="checkbox"/> Estate <input type="radio"/> General (Plenary) OR <input type="radio"/> Limited		
* Annual Report?:	<input type="radio"/> Yes <input checked="" type="radio"/> No Primarily used for backloading.		
* 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="12,000"/>
		Date of Bond:	<input type="text" value="07/23/2020"/>
		Bond Company:	<input type="text" value="RLI"/>
* Amended Bond?:	<input type="radio"/> Yes <input checked="" type="radio"/> No		
* Guardian(s) Limitations?:	<input checked="" type="radio"/> Yes <input type="radio"/> No <div style="border: 1px solid gray; padding: 2px; font-size: small;"> 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 decision. 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 TESTSON"/> (Select the most recent judge to issue an order in this case.)		
Judgment Comments:	<input style="width: 100%; height: 40px;" type="text" value="Enter any important information that does not fit into any of the fields above"/>		
		 <input type="button" value="Back"/> <input type="button" value="Continue"/>	

The IP Profile

- 1) Enter the IP's home address
- 2) Select the type of residence
- 3) If the IP is residing someplace other than his/her home, answer 'No' and complete the additional address fields
- 4) Select the primary reason for the guardianship
- 5) Enter gender if known
- 6) Enter SSN if known
- 7) Enter DOB if known
- 8) Enter marital status if known

When all required * information is complete, click 'Continue'.

Note: If the IP's name is not on the deed/lease, then select "Relative or Friends Home". For example, an adult child who resides with parents.

▼ Incapacitated Person (IP) Profile

* First Name: Middle Name: * Last Name: Suffix:

Alias Phone

Home Address: 1

* Address Line 1: Address Line 2:

* City: * State: * Zip Code:

* Current Residential Arrangement: 2

* Current Residence same as Home Address?: Yes No 3

Click Ctrl + Left Click to select multiple entries

* Disability: 4

- 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: 6 Date of Birth: 7

* Gender: 5 Marital Status: 8

Additional Profile Info:

- Own Home
 - State Mental Health Facility
 - Assisted Living Residential
 - Unknown
 - Private Mental Health Facility
 - Other
 - State Developmental Center
 - Residential Group Home
 - Independent Living Residences
 - Relative Or Friends Home
 - Medical Facility Or Hospital
 - Skilled Nursing Facility
- 2

* Current Residence same as Home Address?: Yes No 3

* Address Line 1: Address Line 2:

* City: * State: * Zip Code:

IP Attorney Profile

- 1) Enter the Bar ID and click 'Search'
- 2) Select the radio button next to the correct results (there may be multiple addresses so consult with the file to determine which to select)
- 3) Check the judgment to determine if the judge discharged the attorney. If yes, select 'Yes' otherwise select 'No'. **See** Paragraph 14 of the Model Judgment.
- 4) If the Bar ID is not in the pleadings, use the 'Search Attorney Index' link to search for the attorney by name.

When all required * information is complete, click 'Continue'.

▼ IP Attorney Profile 1

* Attorney Bar ID: 4 [Search Attorney Index](#)

Select	Attorney Name	Firm Name	Firm Address
<input type="radio"/> 2	PHOEBE CHRISTIAN BENTLEY	HOLLANDER, STRELZIK, PASCULLI, ET AL	40 PARK PLACE QA CAMS NEWTON NJ 07860

* Discharged: Yes No 3

Guardian Profile – Individual

If the guardian is an individual, select 'Party Name' from the dropdown.

Do not add heads of institutions under 'Party Name'. For example, Helen Dodick is the head of the Office of the Public Guardian. In that case, the guardian is the institution, not Helen Dodick.

The Model Judgment appoints the guardian or guardians in Paragraph 2.

Each guardian gets a separate profile page.

Search for Guardian

▼ Case Details		County Docket No.: 2020-0071
County: WARREN	Status:	Date Filed: 05/13/2020
▶ Judgment	07/23/2020	
▶ Incapacitated Person (IP) Profile	DAPHNE DUNNE	STATUS: ACTIVE
▶ IP Attorney Profile	PHOEBE CHRISTIAN BENTLEY	STATUS: INACTIVE
▼ Guardian Profile		
* Search By: <input type="text" value=""/>		
<div style="border: 1px solid gray; padding: 2px; display: inline-block;"> Party Name Institution Name </div>		
		<input type="button" value="Back"/> <input type="button" value="Continue"/>

Search for the guardian:

- 1) Enter the guardian's name
- 2) Click 'Search'
- 3) If the "No parties found" message displays, the guardian is not in the system
- 4) Click 'Add New Guardian' to add a new guardian profile

If the guardian is in the system, select the radio button next to his/her name. Click 'Continue'.

Make any updates needed on the profile page (see below). **Changes made to the profile will save for all the guardian's cases.**

Search for Guardian

✖ No parties found. 3

▼ Case Details	County Docket No.: 2020-0071	
County: WARREN	Status:	Date Filed: 05/13/2020
▶ Judgment	07/23/2020	
▶ Incapacitated Person (IP) Profile	DAPHNE DUNNE	STATUS: ACTIVE
▶ IP Attorney Profile	PHOEBE CHRISTIAN BENTLEY	STATUS: INACTIVE
▼ Guardian Profile		

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

▼ 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.

Select	Party Name 0	Address	Phone 1	DOB
<input type="radio"/>	Martin L Morse	Court St Suite B Montclair NJ 08833	2015566666	

To complete the profile:

- 1) Select the party type
- 2) Answer 'Yes' or 'No'
- 3) Enter address
- 4) Emails are now required on the CIS and Report of Guardian Cover Page and must be included
- 5) Enter all other requested information if known

When all required * information is complete, click 'Continue'.

A success message will display.

▼ Guardian Profile

*Party Type: 1 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 2

*Address Line 1: 3 Address Line 2:

*City: *State: *Zip Code:

Phone 1: Phone 2:

Email Address 1: 4 Email Address 2:

Social Security Number: Date of Birth: Relationship to IP: 5

Gender:

Interpreter Needed?: Yes No

Additional Profile Info:

Add New Guardian

✔ Added Guardian successfully

Guardian Profile – Institutions

- 1) If the guardian is an institution, select 'Institution Name' from the dropdown.
- 2) Select the institution named as guardian
- 3) Click 'Continue'
- 4) Select the 'Party Type'
- 5) Click 'Continue'

If the guardian institution is not in the dropdown list, select 'Not Listed'.

For more detailed information about adding guardians, see the QRG entitled "Adding Guardians".

Guardian Profile

* Search By: * Institution Name: 2

1

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

Screen ID: ECGM0160 | Copyright NJ Judiciary 2014

3

Guardian Profile

* Party Type: 4

Institution Name: Institution Type:

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

Address Line 1: Address Line 2:

City: State: Zip Code:

Phone 1: Phone 2:

Email Address 1: Email Address 2:

Additional Profile Info:

5

Submitting the Case for Creation

After at least one guardian has been added, the 'Submit' button is enabled. After clicking 'Submit', a pop-up displays. Click 'Yes' to complete case creation.

Review/Submit Filing

▼ Case Details		County Docket No.: 2020-0071	
County: WARREN	Status:	Date Filed: 05/13/2020	
▶ Judgment	07/23/2020		
▼ Parties			
▶ Incapacitated Person (IP) Profile	DAPHNE DUNNE	STATUS: ACTIVE	
▶ IP Attorney Profile	PHOEBE CHRISTIAN BENTLEY	STATUS: INACTIVE	
▶ Guardian Profile	LISA LANE	Appointment Date:	STATUS: ACTIVE
▶ Guardian Profile	MARTIN L MORSE	Appointment Date:	STATUS: ACTIVE
▶ Guardian Profile	CHASE BANK	Appointment Date:	STATUS: ACTIVE

Submit Filing

Review ALL information and documents for accuracy prior to submitting the filing. Once submitted, documents will be included in the case jacket.

A confirmation displays.
Cases are not saved until
the confirmation displays.

Cases cannot be saved as
works in progress.

To proceed to upload
documents to the Case
Jacket, click 'Upload
Documents'.

For more detailed
information about
uploading documents, see
the QRG entitled "Upload
Document".

Confirmation

✔ Case has been successfully created.
Please upload Case Initiation Documents.

▼ Case Details		County Docket No.: 2020-0071	
County: WARREN	Status:	Date Filed: 05/13/2020	
▶ Judgment		07/23/2020	
▼ Parties			
▶ Incapacitated Person (IP) Profile	DAAPHNE DUNNE		STATUS: ACTIVE
▶ IP Attorney Profile	PHOEBE CHRISTIAN BENTLEY		STATUS: INACTIVE
▶ Guardian Profile	LISA LANE	Appointment Date:	STATUS: ACTIVE
▶ Guardian Profile	MARTIN L MORSE	Appointment Date:	STATUS: ACTIVE
▶ Guardian Profile	CHASE BANK	Appointment Date:	STATUS: ACTIVE
Transaction Information			
Transaction ID: GMP20213632			
Received by eCourts on: 08/05/2021			

View/Print Filing
Upload Documents
Find New Case