

# 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

Formal Accounting.pdf

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**\*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 icon
- 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:** two text input fields 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, there 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**

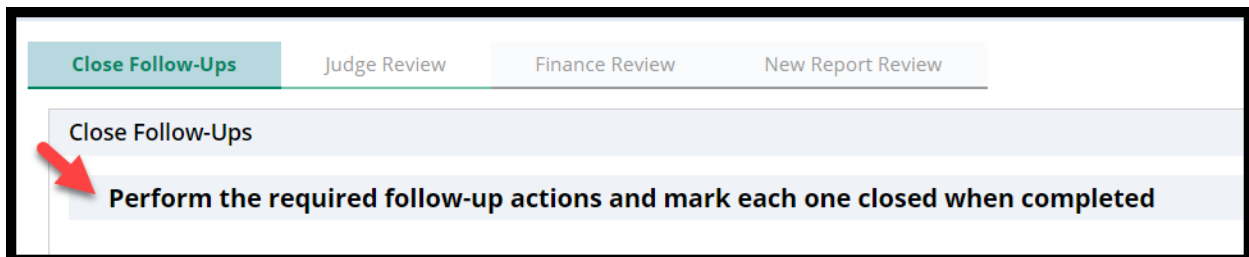
04/15/2021 04:06 PM	'InitialJudgmentDate' updated from '03/03/2021' to '03/04/2021'.	'BondAmount' updated from '4000' to ''.
04/15/2021 03:57 PM	'InitialJudgmentDate' updated from '03/03/2021' to '03/04/2021'.	'BondAmount' updated from '' to '4000'.

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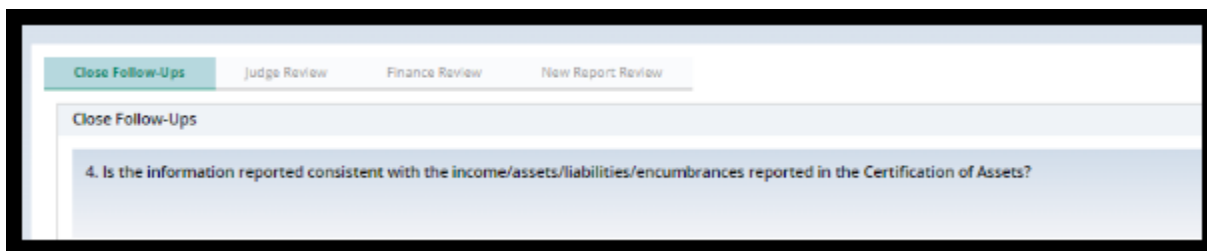
## Follow-Ups Tab Instructions

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

### After the enhancement:



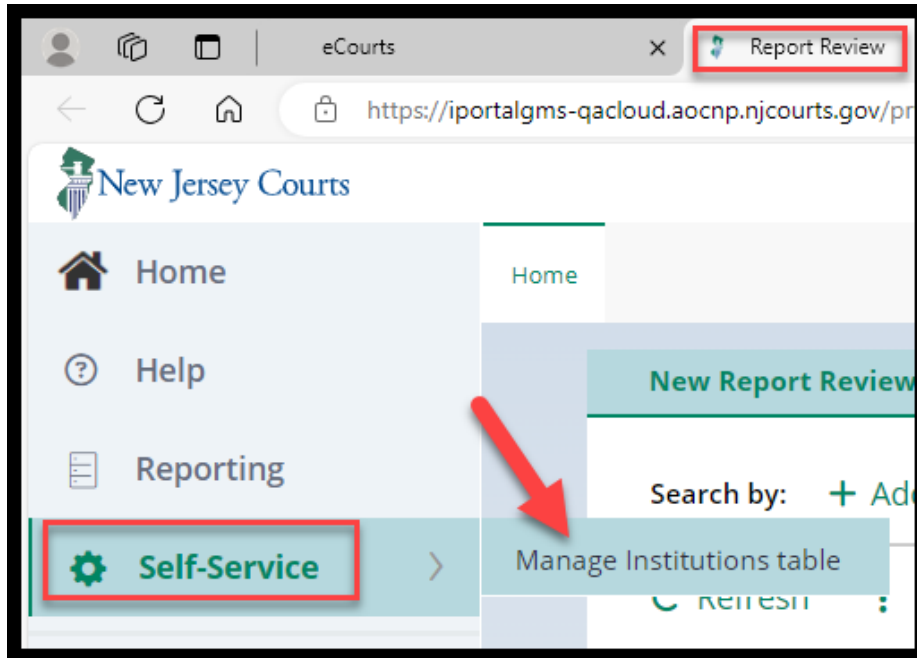
### Prior to the enhancement:



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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 above two search fields: 'Institution Name' (a text input field) and 'Institution Type' (a dropdown menu with 'Select..' as the current selection). To the right of these fields are 'Search' and 'Reset' buttons.



**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
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[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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