

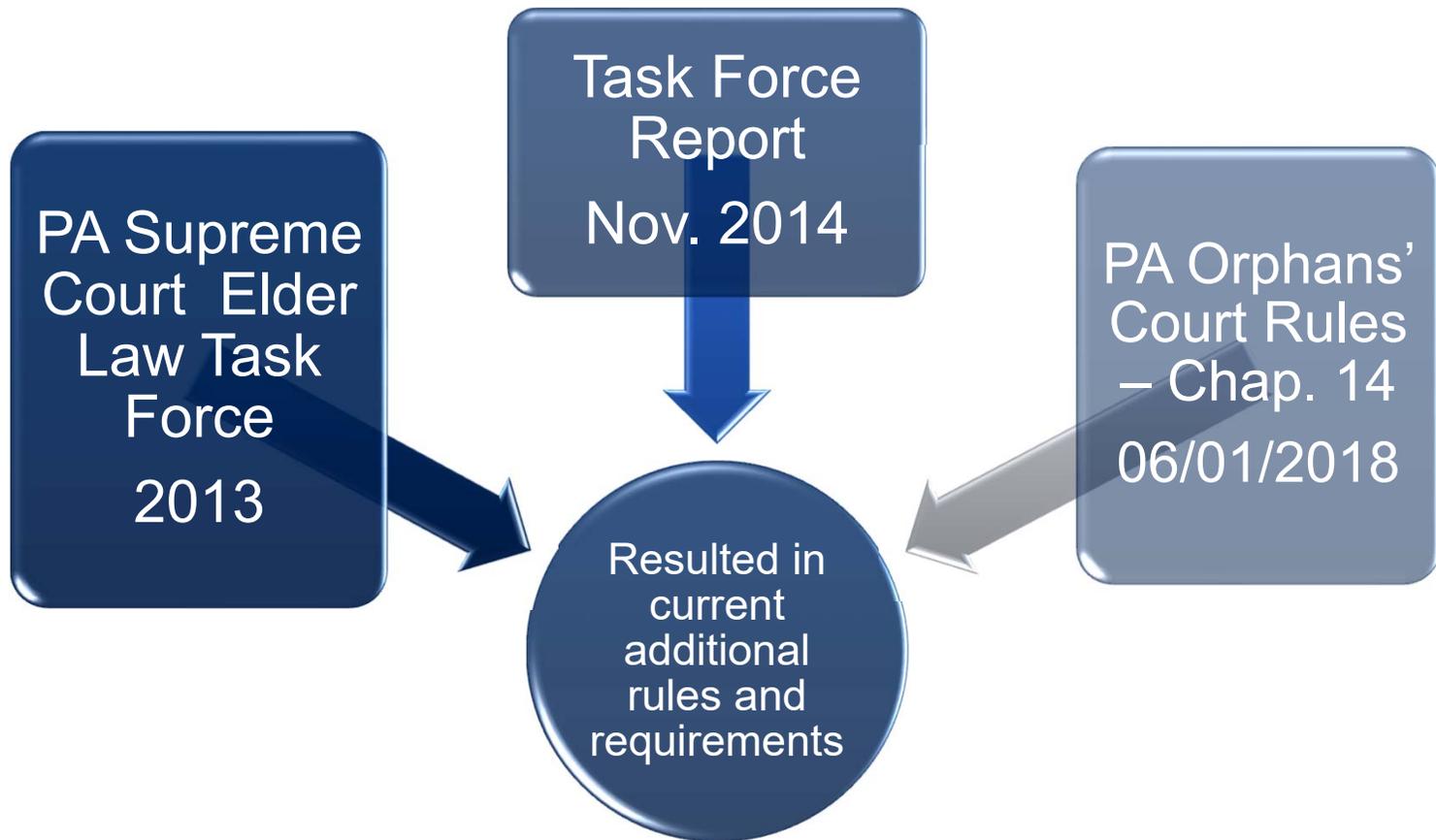


Guardianship: *The Good, the Bad, the Ugly*

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Some history.....



Some Terms/Concepts

- Guardian of the person vs guardian of the estate
- Limited guardianship vs plenary guardianship
- Guardianship vs Power of Attorney

The Guardianship Process

1. Petition for Citation
2. Timing
3. Closed Court Hearing
4. Medical Testimony Required



FAQ's

How long does the process take?

2-3 months

How much does it cost?

\$2,500.00 give or take

How effective is the end result?

Depends

FAQ's

How long does the hearing take?

30 minutes up to multiple days

What do we do after the hearing?

File Inventory and annual reports

What if circumstances change in the future?

Go back to Court

Digging Deeper into Rule Changes

- Criminal background check now required for all proposed guardians
- Mandated medical expert report state form
- Online filing of Inventory and Annual Reports –
 - UJS Web Portal <https://ujportal.pacourts.us>
 - GTS – Guardianship Tracking System





The Unified JUDICIAL SYSTEM of PENNSYLVANIA WEB PORTAL

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Guardianship

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The Pennsylvania Guardianship Tracking System (GTS) is an application that allows guardians of adult-incapacitated persons to submit inventory and annual person and estate reports online. Payment of any associated fees is accepted at the time a filing is submitted and may be made with a Visa, MasterCard, Discover, American Express, or ATM card. Upon the completion of a filing, it will be transmitted to the applicable court for processing.

A secure account is required to use the GTS. If you already have an account, [log in](#) to begin. If you do not have a secure account, you must [create](#) one. [Step-by-step instructions](#) and a [short video](#) are available to assist you with this process.

Please note: A secure account can access multiple secure areas of the UJS Portal. There is no need to create separate accounts, particularly for Pennsylvania attorneys, to access each secure service or application.

The GTS application is designed strictly for tracking and submitting guardianship-related reports online. It is not a resource for learning more about the Pennsylvania guardianship process. If you would like more information about guardianships in general, refer to the Unified Judicial System of Pennsylvania's [website](#).

[Help Center](#)

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GTS – Guardianship Tracking System

- New Guardians should:
 - Create new account with GTS
 - <https://www.youtube.com/watch?v=T6Ai1IXm1Lw>
 - Receive mailed letter from County with GTS tracking instructions and access code
 - GTS Dashboard
 - Can file annual reports up to 30 days in advance
 - Will receive email confirmation of filing – if not received in 3-4 days, call Court immediately

GTS - Guardianship Tracking System

Can you file hard copies of Inventory and Reports directly with the Court?

- Each County has discretion
- Be sure to keep hard copies of what you file
- <http://help.pacourts.us/GTSHelpDocs/GTS%20Guardian%20User%20Manual.pdf>
- Expect to receive notice as filings become due



100%

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SYSTEM of PENNSYLVANIA*

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Orphans' Court Forms

Please note that these forms are meant to be downloaded and filled in, and may not work properly in your browser window. If a file does not appear to be working, download the PDF and fill it in that way.

Please note that forms G-05 Guardian's Inventory for an Incapacitated Person, G-02 Guardian's Report of the Person, and G-03 Guardian's Report of the Estate may all be electronically filed directly to the Clerk of the Orphans' Court through the Guardianship Tracking System (GTS). If you are interested in electronic filing, please contact the Clerk of the Orphans' Court Office in your county to obtain an access code. Upon obtaining an access code, please visit <https://ujportal.pacourts.us/> and select the GTS icon for step by step instructions to create your secure account.

Audit and Administration



OC-07 - Notice of Claim (filed Pursuant to 20 Pa. C.S. § 5502)

Guardianship

- G-01 - Important Notice: Citation with Notice (Pa. O.C. Rule 14.5) EFFECTIVE UNTIL MAY 31, 2019
- G-02 - Report of Guardian of the Estate - EFFECTIVE JULY 1, 2018
- G-03 - Report of Guardian of the Person - EFFECTIVE JULY 1, 2018
- G-02 - Report of Guardian of the Estate INSTRUCTIONS
- G-04 - Guardian's Inventory for a Minor - EFFECTIVE JULY 1, 2018
- G-05 - Guardians's Inventory for an Incapacitated Person - EFFECTIVE JULY 1, 2018
- OC 03 - Guardianship of Incapacitated Person: Petition for Adjudication/Statement of Proposed Distribution Pursuant to Pa. O.C. Rule 2.4 Eff 09 01 16
- OC 04 - Guardianship of Minor: Petition for Adjudication/Statement of Proposed Distribution Pursuant to Pa. O.C. Rule 2.4 Eff 09 01 16

Guardianship (effective June 1, 2019)

- G-01 - Citation with Notice
- G-06 - Expert Report
- G-07 - Notice of Filing

Inventory – Mandatory Form

- Inventory is due 3 months from date of Order

Note new mandatory form asks about:

- Personal Care Plan
- Medical Information

Report of Guardian of Person and Guardian of Estate

- Annual reports are due one year from date of Order
 - I try to extend report date to the end of a month for ease of reporting
 - The System builds in a 20-30 day grace period on filings

GTS Help Desk 1-877-227-2672

- If in doubt, call
 - Collette and Steve are patient and understanding
- Logging in requires an access code
 - Call County Orphans' Court for your letter
- On Inventory only list financial assets
- Be sure to save your work every 10 minutes
 - If info isn't saved within 20 minutes, the GTS system automatically deletes it
 - Saving bounces you back to the dashboard



GTS Help Desk 1-877-227-2672

- Account for trust assets, ABLE accounts, and burial accounts
 - Even though guardian may not have access to these assets
- Estate Report
 - Part V, #2 – on first annual report, must list all assets
 - On subsequent annual reports, previously listed assets will transfer over to the report currently being prepared

A LONG TIME AGO IN A GALAXY FAR, FAR AWAY...



THE PHANTOM MENACE

ATTACK OF THE CLONES

REVENGE OF THE SITH

A NEW HOPE

THE EMPIRE STRIKES BACK

RETURN OF THE JEDI

STAR WARS

Thanks for your Attention

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