

# eCourts Guardianship

## Report Review - Finance Overview June 2021

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## Finance Review Overview

This guide is an overview of the Finance Review portion of Report Review.

To begin a report review, open the Case Management tab, then click the Report Review tab.



Judiciary eCourts System - Guardianship Home | Help

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

eCOURTS HOME **CASE MANAGEMENT** UPLOAD DOCUMENT CASE JACKET User: [dropdown]

Welcome to eCourts

Announcements

There are no announcements.



Judiciary eCourts System - Guardianship

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

Case Search **Report Review**

Manage Case

Only alphabetic characters can be entered in name fields.

Search for County Docket Number (exact): \*

OR

Search for Incapacitated Person: \* First Name  \* Last Name

## Workbasket/home Screen

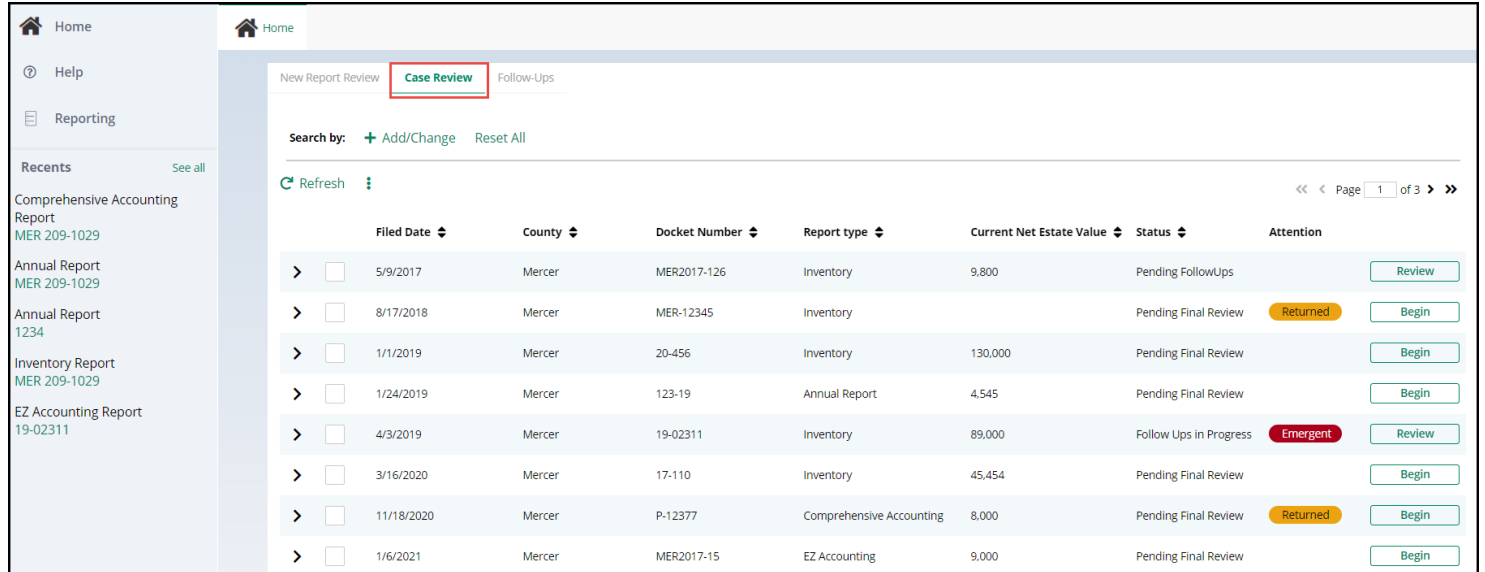
Finance work takes place in the **Case Review** workbasket.

**Note:** The workbasket is not individualized. All users with the same county access see the same workbasket.

The **New Report Review** workbasket is for volunteers.

The **Follow-Ups** workbasket is for users working on the follow-up actions selected on reviews containing identified issues.

Finance users can see read-only versions of reviews in other workbaskets and statuses.



The screenshot shows the 'Case Review' workbasket interface. It features a navigation menu on the left with options like Home, Help, Reporting, and Recents. The main area displays a table of reports with the following columns: Filed Date, County, Docket Number, Report type, Current Net Estate Value, Status, and Attention. The table contains 8 rows of data, each with a 'Review' or 'Begin' button. The 'Attention' column includes labels like 'Returned' and 'Emergent'.

| Filed Date | County | Docket Number | Report type              | Current Net Estate Value | Status                 | Attention        |
|------------|--------|---------------|--------------------------|--------------------------|------------------------|------------------|
| 5/9/2017   | Mercer | MER2017-126   | Inventory                | 9,800                    | Pending FollowUps      | Review           |
| 8/17/2018  | Mercer | MER-12345     | Inventory                |                          | Pending Final Review   | Returned, Begin  |
| 1/1/2019   | Mercer | 20-456        | Inventory                | 130,000                  | Pending Final Review   | Begin            |
| 1/24/2019  | Mercer | 123-19        | Annual Report            | 4,545                    | Pending Final Review   | Begin            |
| 4/3/2019   | Mercer | 19-02311      | Inventory                | 89,000                   | Follow Ups in Progress | Emergent, Review |
| 3/16/2020  | Mercer | 17-110        | Inventory                | 45,454                   | Pending Final Review   | Begin            |
| 11/18/2020 | Mercer | P-12377       | Comprehensive Accounting | 8,000                    | Pending Final Review   | Returned, Begin  |
| 1/6/2021   | Mercer | MER2017-15    | EZ Accounting            | 9,000                    | Pending Final Review   | Begin            |

**Columns:**

**Filed Date** is the date the report was filed with the Surrogate

**County:** users see cases only from their county/counties

**Docket Number** – eCourts case docket number

**Report Type** – report type under review

**Current Net Estate Value** is the most recent value reported by the guardian through a financial report

**Status** - current progression of the review within the report review process

**Attention** denotes when a review is **Emergent** (needs judge review asap) and when a review has been **Returned** by a judge or other user for **re-review** by Finance


| Filed Date | County | Docket Number | Report type | Current Net Estate Value | Status | Attention |
|------------|--------|---------------|-------------|--------------------------|--------|-----------|
|------------|--------|---------------|-------------|--------------------------|--------|-----------|


**Workbasket default sort order:**

- Returned
- Emergent
- By Filed Date

| 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                | 8,900                    | Pending Finance Review | Returned <input type="button" value="Begin"/> |
| 6/4/2021   | Mercer | MER-349-39392 | Comprehensive Accounting | 8,900                    | Pending Finance Review | Returned <input type="button" value="Begin"/> |
| 2/5/2020   | Mercer | 20-00999      | EZ Accounting            | 12,000,000               | Pending Finance Review | Emergent <input type="button" value="Begin"/> |

## Workbasket Functions:


Clicking the  Home icon returns the user to the workbasket.

 Help displays a PDF containing user FAQs and helpful information.

Reporting is used primarily by AOC Civil Practice and Program Coordinators.

Recents is a user specific list of reviews recently opened.




-  Home
-  Help
-  Reporting

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**Recents** [See all](#)

- Comprehensive Accounting Report  
MER 209-1029
- Annual Report  
MER 209-1029
- Annual Report  
1234
- Inventory Report  
MER 209-1029
- EZ Accounting Report  
19-02311

| Reporting                         |   | Title                           | Docket Number | Opened         |
|-----------------------------------|---|---------------------------------|---------------|----------------|
| <b>Recents</b>                    | <a href="#">See all</a>   | Inventory Report                | 11-2020       | 3 minutes ago  |
| Inventory Report<br>11-2020       |  | Inventory Report                | MER-349-39392 | 12 minutes ago |
| Inventory Report<br>MER-349-39392 |   | Inventory Report                | 20-00999      | 25 minutes ago |
|                                   |   | Comprehensive Accounting Report | MER 209-1029  | 3 days ago     |

**Filtering the workbasket**

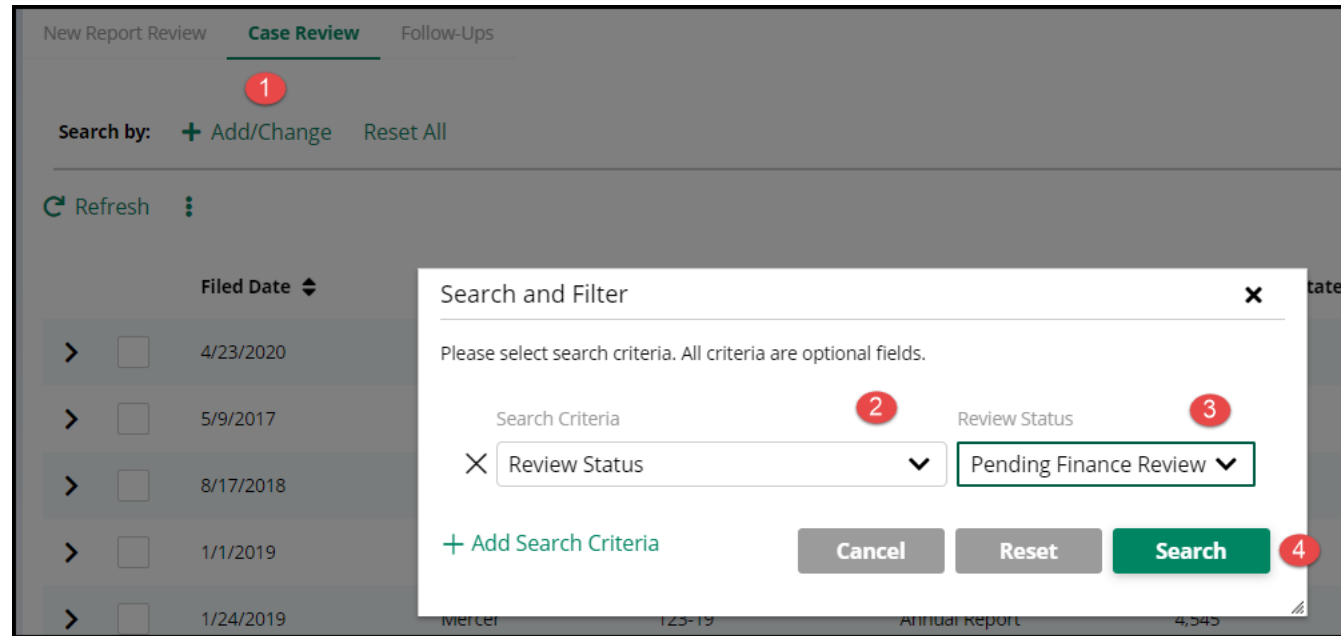
Clicking **+ Add/Change** allows users to search and filter the workbasket.

To display only reviews for Finance users:

- 1) Click 'Add/Change'
- 2) Select the 'Review Status' search criteria
- 3) Select 'Pending Finance Review' or 'Finance Review Draft'
- 4) Click Search

Only the cases for Finance review will display.

**Note:** You may add more than one search criteria by clicking +Add Search Criteria.



New Report Review **Case Review** Follow-Ups

Search by: **+ Add/Change** Reset All

Refresh

Filed Date

4/23/2020

5/9/2017

8/17/2018

1/1/2019

1/24/2019

Search and Filter

Please select search criteria. All criteria are optional fields.

Search Criteria

Review Status

Review Status

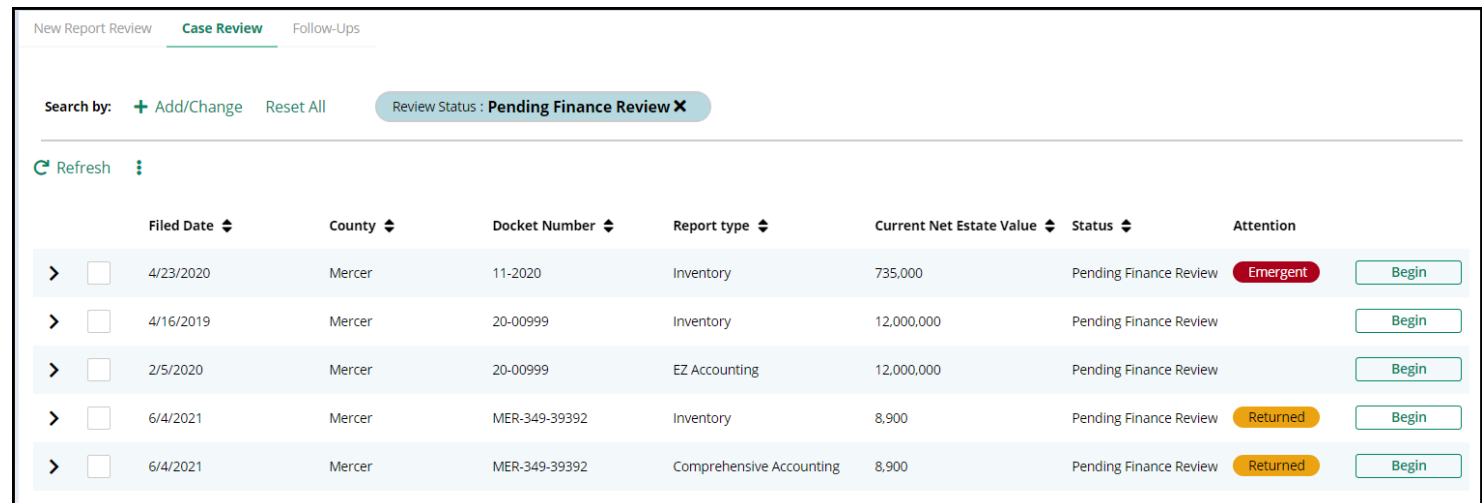
Pending Finance Review

+ Add Search Criteria

Cancel

Reset

Search



New Report Review **Case Review** Follow-Ups

Search by: **+ Add/Change** Reset All **Review Status : Pending Finance Review X**

Refresh

|   | 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 | Emergent  | Begin |
| > | 4/16/2019  | Mercer | 20-00999      | Inventory                | 12,000,000               | Pending Finance Review |           | Begin |
| > | 2/5/2020   | Mercer | 20-00999      | EZ Accounting            | 12,000,000               | Pending Finance Review |           | Begin |
| > | 6/4/2021   | Mercer | MER-349-39392 | Inventory                | 8,900                    | Pending Finance Review | Returned  | Begin |
| > | 6/4/2021   | Mercer | MER-349-39392 | Comprehensive Accounting | 8,900                    | Pending Finance Review | Returned  | Begin |

**Searching the workbook**  
for a specific case.

To search by a specific docket number or transaction ID click

[+ Add/Change](#) then choose the required criteria and enter the desired value and click 'Search'.

To clear the filter, click 'Reset All'.

**Search and Filter** ✕

Please select search criteria. All criteria are optional fields.

Search Criteria Docket Number

✕ Docket Number 20-00999

[+ Add Search Criteria](#) Cancel Reset Search

Search by: [+ Add/Change](#) [Reset All](#) Docket Number : 20-00999 ✕

[Refresh](#) ⋮

|                            | Filed Date | County | Docket Number | Report type   | Current Net Estate Value | Status                 | Attention                |
|----------------------------|------------|--------|---------------|---------------|--------------------------|------------------------|--------------------------|
| > <input type="checkbox"/> | 4/16/2019  | Mercer | 20-00999      | Inventory     | 12,000,000               | Finance Review Draft   | <a href="#">Continue</a> |
| > <input type="checkbox"/> | 2/5/2020   | Mercer | 20-00999      | EZ Accounting | 12,000,000               | Pending Finance Review | <a href="#">Begin</a>    |

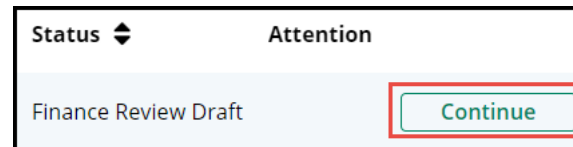
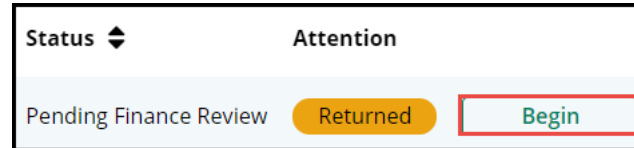


## Beginning a review

Once you have filtered or searched for the report you would like to review, use the **'Begin'** action button to start a review that is in 'Pending Finance Review' status.

If a review was previously begun, but saved prior to completion, the review status will be 'Finance Review Draft' and the action button is **'Continue'**.

Click on 'Begin' or 'Continue' to open a review.



## Review Screen

Once 'Begin' or 'Continue' has been selected, the review will open in a new tab.

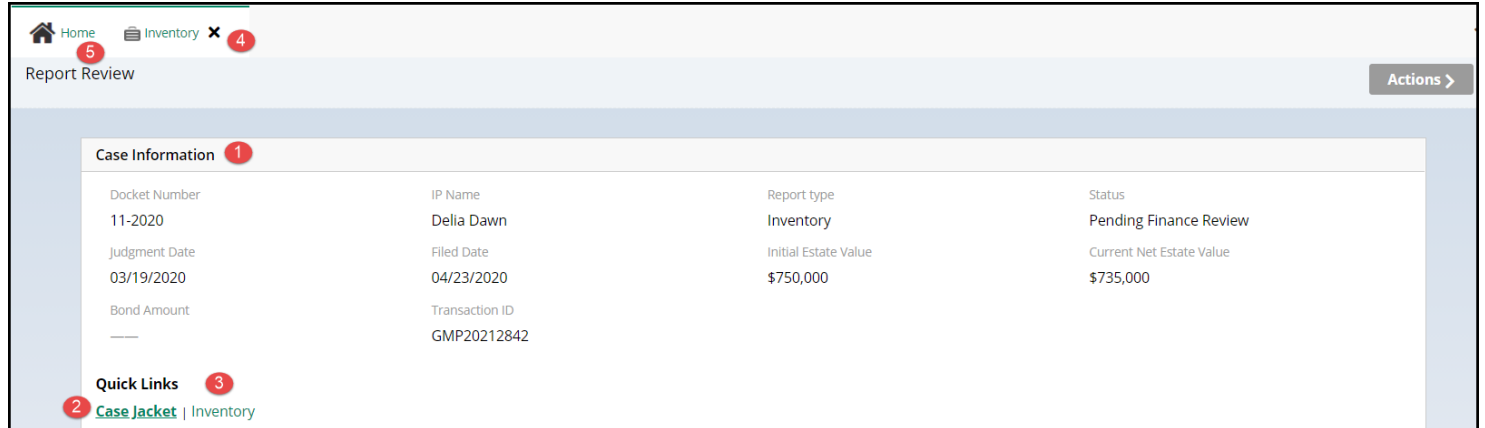
Each review has 3 sections:

- Case Information
- Performance area
- Audit section

### Case Information Section

- 1) Basic case information
- 2) Link to the Case Jacket
- 3) Link to the report under review

Note: The Home or workbasket screen remains available in a separate tab



The screenshot shows a web application interface for 'Report Review'. At the top, there are navigation tabs for 'Home' (with a red '5' notification) and 'Inventory' (with a red '4' notification). Below the tabs, the page title is 'Report Review' and there is an 'Actions >' button. The main content area is divided into two sections:

- Case Information** (with a red '1' notification): A table with the following data:
 

| Docket Number | IP Name        | Report type          | Status                   |
|---------------|----------------|----------------------|--------------------------|
| 11-2020       | Delia Dawn     | Inventory            | Pending Finance Review   |
| Judgment Date | Filed Date     | Initial Estate Value | Current Net Estate Value |
| 03/19/2020    | 04/23/2020     | \$750,000            | \$735,000                |
| Bond Amount   | Transaction ID |                      |                          |
| ---           | GMP20212842    |                      |                          |
- Quick Links** (with a red '3' notification): A section containing a link for 'Case Jacket | Inventory' (with a red '2' notification).

**Performance Area**

- 1) **Independent review area** for answering questions and selecting issues and follow-ups if any
- 2) **New Report Review Tab** displays read-only results from New Report Review (volunteer level review)
- 3) **Net Estate Value** field for the report under review
- 4) **Cancel, Save and Next** buttons
  - a. **Cancel** closes the review
  - b. **Save** – saves review in progress
  - c. **Next** advances the review

**Finance Review**    New Report Review    2

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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 3  ?

4
Cancel    Save    Next

**Audit Section**

Contains a list of all case actions.

The **Draft Notes** tab contains notes entered when a review has been saved as a draft and notes entered when a review is returned to Finance for re-review.


| Audit Draft Notes   |  |              |
|---------------------|--|--------------|
| Time                | Description  | Performed by |
| 06/07/2021 11:09 AM | New Report Review complete and sent to Finance Review. | susan.flynn  |
| 06/07/2021 11:09 AM | Review Status changed to Pending Financial Review.     | susan.flynn  |
| 06/07/2021 10:44 AM | 'CurrentNEV' updated from '750000' to '735000'.        | gmstest3     |
| 06/07/2021 10:44 AM | Review Status changed to New Report.                   | gmstest3     |
| 06/07/2021 10:44 AM | New Report Review Created.                             | gmstest3     |

### Performing a Review

The New Report Review tab contains a read-only view of the results of the volunteer level review.

**Note:** if a volunteer identified an issue as Emergent, then the red Emergent token displays in the Attention column on the workbasket.

The New Report Review results can also be viewed in the Case Jacket.

|  |   |   |             |            |             |
|--|---|---|-------------|------------|-------------|
| Finance Review   |   | <b>New Report Review</b>  |             |            |             |
| <b>New Report Review</b>   |   |   |             |            |             |
| 1. Is the reporting period correct?  |   |   |             | No         |             |
| Emergent?  |   |   |             | No         |             |
| Issue List   |   | Comment/Explanation   |             |            |             |
| Reporting period incorrect/gap   |   | Only covers 6 months  |             |            |             |
| 2. Is the correct reporting form used?   |   |   |             | Yes        |             |
| 3. Does the report contain all required information?   |   |   |             | No         |             |
| Emergent?  |   |   |             | No         |             |
| Issue List   |   | Comment/Explanation   |             |            |             |
| Incomplete   |   | Missing info on IP's real property  |             |            |             |
| 4. Is the information reported consistent with the income/assets/liabilities/encumbrances reported in the Certification of Assets? |   |   |             | No         |             |
| Emergent?  |   |   |             | Yes        |             |
| Issue List   |   | Comment/Explanation   |             |            |             |
| Schedule A: Real Property  |   | Missing info re the IP's house  |             |            |             |
| 04/23/2020   |  | <b>EMERGENT:</b> Report Review - New Report Review RE: Inventory<br>[GMP20212842] | GMP20212846 | 06/07/2021 | susan.flynn |

**Answering Questions**

1) Answer each Yes/No question

If there is an issue, additional fields display:

2) If the issue is emergent, check the box

3) Select one or more issues from the dropdown list

4) Select one or more follow-ups from the dropdown list **OR** check No Follow Up Needed

5) Comments are required

9. Are there other areas of concern? 1  Yes  No

Emergent? 2

Issues

Select Issue(s) Clear 3

- Tax returns
- Tax payments
- Beginning cash balance does not match ending balance of prior report
- Guardian needs information or assistance
- Guardian has not identified, traced or collected all of the IP's assets
- Other

Clear

Follow Ups

Select Follow Up(s) Clear 4

- 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)
- Referral to Adult Protective Services, County Prosecutor, and/or Office of Attorney Ethics
- Issue Order to Show Cause
- Other/General Comments

rted in the Cert

No Follow Up Needed

Comment/Explanation 5

Comment/Explanation

Remaining: 150 characters

### Follow-Ups

**Note:** The follow-up(s) selected determine if the review goes to Judge Review or Final Review.


Selection of any of the follow-ups at right will route the review to Judge Review upon completion of Finance Review.

### Net Estate Value

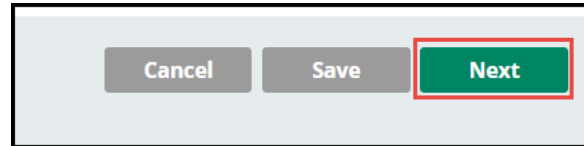
The value in the Net Estate Value field should be the figure provided by the guardian in the report under review. This field can be updated if it is incorrect.

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

Schedule conference with guardian(s)  
 Issue amended judgment  
 Issue Order to Show Cause  
 Referral to Adult Protective Services, County Prosecutor, and/or Office of Attorney Ethics

|   |   |
|---|---|
| \$750,000                                   |  |
| Confirm NEV matches the report under review |   |

When all questions have been answered, click **'Next'**.



A horizontal bar containing three buttons: 'Cancel', 'Save', and 'Next'. The 'Next' button is highlighted with a red border.

A read-only review screen displays.

**Finance 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? | No  |

Emergent?  
No


|            |  |
|------------|--|
| Issue List | Comment/Explanation  |
| Incomplete | According to the Cert of Assets, the IP owns real property. It is not accounted for in the Inventory. Need more info from the gdn re the real property |

Clicking **'Back'** returns the user to the performance screen to make changes.

When satisfied with the review, click **'Submit'**.

A pop-up confirmation displays. Click **'Confirm'** to submit the review.

**'Cancel'** returns the user to the read-only screen.



A horizontal bar containing two buttons: 'Back' and 'Submit'. The 'Submit' button is highlighted with a red border.

**Confirm Submission** ✕

You are about to submit the report review of Inventory Report in Docket 11-2020. No additional changes to this review will be possible.



### Completed Review

- 1) A confirmation displays showing that the review has progressed to the next level of review
- 2) The Case Jacket contains a PDF summary of the Finance Review
- 3) Clicking 'Close' returns the user to the workbasket

The review remains in the Case Review workbasket but will now be in either Final Review or Judge Review status.

**Note:** The action button is now 'Review' because Finance users have read-only access to reviews at other levels of Report Review.

Review Submitted. 1
✕

| Case Information |                |                      |                          |
|------------------|----------------|----------------------|--------------------------|
| Docket Number    | IP Name        | Report type          | Status                   |
| 11-2020          | Delia Dawn     | Inventory            | Pending Judge Review     |
| Judgment Date    | Filed Date     | Initial Estate Value | Current Net Estate Value |
| 03/19/2020       | 04/23/2020     | \$750,000            | \$735,000                |
| Bond Amount      | Transaction ID |                      |                          |
| ---              | GMP20212842    |                      |                          |

Case Jacket has been updated with a report summary, transaction ID GMP20212847 2
3


Close

New Report Review
Case Review
Follow-Ups

Search by: + Add/Change
Reset All
Review Status : Pending Judge Review ✕

↻ Refresh
⋮

|   | Filed Date | County | Docket Number | Report type | Current Net Estate Value | Status               | Attention |        |
|---|------------|--------|---------------|-------------|--------------------------|----------------------|-----------|--------|
| > | 4/23/2020  | Mercer | 11-2020       | Inventory   | 735,000                  | Pending Judge Review | Emergent  | Review |



### Saving as Draft

To save a review in progress, click 'Save'.

Comments are required in the 'Add Draft Note' text box. Click 'Add'.

The review will be in Finance Review Draft status.

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

11. Net Estate Value (NEV) for this report

Add Draft Note ✕

Saving as a draft - will complete the review by end of day 6/8/21

Remaining: 85 characters

Search by: [+ Add/Change](#) [Reset All](#) Review Status: Finance Review Draft ✕

[Refresh](#) ⋮

|                            | Filed Date | County | Docket Number | Report type              | Current Net Estate Value | Status               | Attention                               |
|----------------------------|------------|--------|---------------|--------------------------|--------------------------|----------------------|---|
| > <input type="checkbox"/> | 4/16/2019  | Mercer | 20-00999      | Inventory                | 12,000,000               | Finance Review Draft | <input type="button" value="Continue"/> |
| > <input type="checkbox"/> | 6/3/2021   | Mercer | MER 209-1029  | Comprehensive Accounting | 3,534                    | Finance Review Draft | <input type="button" value="Continue"/> |

When the review is opened again, the **Audit** section will show which user saved the review as a draft and when.

| Audit <span style="border: 1px solid red; padding: 2px;">Draft Notes</span> |  |              |
|---|--|--------------|
| Time  | Description  | Performed by |
| 06/07/2021 01:39 PM   | Report Review saved as draft.                          | GMSTEST3     |
| 06/07/2021 01:39 PM   | Review Status changed to Finance Review Draft.         | GMSTEST3     |
| 06/07/2021 10:57 AM   | New Report Review complete and sent to Finance Review. | susan.flynn  |
| 06/07/2021 10:57 AM   | Review Status changed to Pending Financial Review.     | susan.flynn  |
| 06/07/2021 10:39 AM   | 'CurrentNEV' updated from '2250000' to '12000000'.     | gmstest3     |
| 06/07/2021 10:39 AM   | 'CurrentNEV' updated from '12250000' to '2250000'.     | gmstest3     |
| 06/07/2021 10:28 AM   | Review Status changed to New Report.                   | gmstest3     |
| 06/07/2021 10:28 AM   | New Report Review Created.                             | gmstest3     |

The **Draft Notes** tab displays the comments entered when the review was saved.

| Audit <span style="border: 1px solid red; padding: 2px;">Draft Notes</span> |   |              |
|---|---|--------------|
| Time  | Description   | Performed By |
| 06/07/2021 01:39 PM   | Finance Review Draft: Saving as a draft - will complete the review by end of day 6/8/21 | GMSTEST3     |

Reviews can be saved as a draft multiple times.

## Returned Reviews

Final Review users and Judge Review users can return a review to Finance.

A returned review will display a **Returned** token in the Attention column.

- 1) The status is Pending Finance Review
- 2) The performance area will display the prior Finance Review results, which can be changed/updated as necessary
- 3) The read-only New Report Review tab displays

Complete the second review as usual.

| New Report Review   |            | Case Review                                    | Follow-Ups    |                          |                          |                        |                                       |
|---|------------|--|---------------|--------------------------|--------------------------|------------------------|---------------------------------------|
| Search by: <a href="#">+ Add/Change</a> <a href="#">Reset All</a> |            | Review Status: <b>Pending Finance Review</b> ✕ |               |                          |                          |                        |                                       |
| Refresh   |            |  |               |                          |                          |                        |                                       |
|   | 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 | <b>Returned</b> <a href="#">Begin</a> |
| >   | 2/5/2020   | Mercer   | 20-00999      | EZ Accounting            | 12,000,000               | Pending Finance Review | <a href="#">Begin</a>                 |
| >   | 6/4/2021   | Mercer   | MER-349-39392 | Inventory                | 8,900                    | Pending Finance Review | <b>Returned</b> <a href="#">Begin</a> |
| >   | 6/4/2021   | Mercer   | MER-349-39392 | Comprehensive Accounting | 8,900                    | Pending Finance Review | <b>Returned</b> <a href="#">Begin</a> |

### Case Information

|               |                                 |                      |                                     |
|---------------|---------------------------------|----------------------|-------------------------------------|
| Docket Number | IP Name                         | Report type          | Status                              |
| MER-349-39392 | Testshal25 2021 Testshal26 2021 | Inventory            | Pending Finance Review <sup>1</sup> |
| Judgment Date | Filed Date                      | Initial Estate Value | Current Net Estate Value            |
| 03/15/2021    | 06/04/2021                      | \$4,000              | \$8,900                             |
| Bond Amount   | Transaction ID                  |                      |                                     |
| \$5,000       | GMP20212683                     |                      |                                     |

**Quick Links**  
[Case Jacket](#) | [Inventory](#)

---

**2** **3**

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

### Finance 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

Emergent?

Issues  
Schedule F: Encumbrances ✕ Clear

**Audit** displays the reason the review was returned:

- Re-examine Report
- Correct/Update Estate Value
- Other

**Draft Notes** displays the comments left by the Judge Review or Final Review user who returned the review to Finance.

When the second review is submitted, it will be routed to Final Review or Judge Review based on which follow-up actions were selected by the Finance Reviewer.

| Audit <span>Draft Notes</span> |  |              |
|--------------------------------|--|--------------|
| Time                           | Description  | Performed by |
| 06/07/2021 02:01 PM            | Review returned from Judge Review to Finance review as Re-examine Report | susan.flynn  |
| 06/07/2021 01:36 PM            | Review Status changed to Pending Judge Review.                           | GMSTEST3     |

| Audit <span>Draft Notes</span> |   |              |
|--------------------------------|---|--------------|
| Time                           | Description   | Performed By |
| 06/07/2021 02:01 PM            | Returned Review Notes : Some issues were missed relating to the IP's pension. Needs further review. | susan.flynn  |