eCourts Guardianship

Estate Value Table Overview
January 2021

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Estate Value Table Section Overview

Within Case Management, each case has the following sections or "twisties":

- Case Details
- Judgment
- Estate Value
- Incapacitated Person (IP) Profile
- IP Attorney Profile
- Guardian Profile for each guardian
- Case Action

This QRG details the function of the **Estate Value** section.

eCOURTS HOME	CASE MANAGEMENT	UPLOAD DOCUMENT	CASE JACKET	User: susan.flynn

Case Search   Report Review

Manage Case

▼ Case Details   County Docket No.: ATL-2018   View Case Jacket

County: ATLANTIC	Status: ACTIVE	Date Filed: 08/21/2018
▶ Judgment	11/07/2018	
▶ Estate Value	Initial Estate Value: $ 22,000	Current Net Estate Value: $ 22,400
▶ Incapacitated Person (IP) Profile	GIDEON GRAHAM	STATUS: ACTIVE
▶ IP Attorney Profile	TEST ERIC BRAND III	STATUS: INACTIVE
▶ Guardian Profile	ALBERT GRAHAM Appointment Date:	STATUS: ACTIVE
▶ Case Action		

Guardian ➕

Find New Case

This section tracks the value of the guardianship estate over the life of the case.

'Initial Estate Value' is the value of the estate at the beginning of the case (Case Initiation Documents or Inventory).

'Current Net Estate Value' is the value of the estate as reported by the guardian(s) in the most recent periodic reports (Annual Report, EZ Accounting, Comprehensive Accounting, SS Representative Payee Report).

NOTE: The Initial Estate Value and the Current Net Estate Value will be the same until a periodic report is uploaded.

The values displayed in the table come from:

1) Reports are uploaded to the Case Jacket; and
2) Updates to the 'Net Estate Value' field in Report Review during the review process.

▼ Case Details	County Docket No.: ATL-2018	View Case Jacket
County: ATLANTIC	Status: ACTIVE	Date Filed: 08/21/2018
▶ Judgment	11/07/2018	
▼ Estate Value	Initial Estate Value: $ 22,000	Current Net Estate Value: $ 22,400

Initial Estate Value: 22,000

Date	Estate Value	Action	Entered By
11/08/2019	$22,400	EZ Accounting Report	susan.flynn
12/26/2018	$22,000	Inventory Report	susan.flynn
08/21/2018	$0	Case Initiation Documents	susan.flynn

Estate Value at Upload

At upload, enter the 'Net Estate Value' as follows:

Case Initiation Documents:

1) Enter 'Total Net Estate' from the Recapitulation in the Inventory; OR if there is no Inventory,
2) Certification of Assets; OR if neither document is in the file
3) Enter 0

Inventory:
Enter 'Total Net Estate' from the Recapitulation

EZ Accounting:
Ending Cash Balance (Line 4 of the Summary Section)

Comprehensive Accounting:
Cash at End of Period (section 2) plus Ending Assets (Part II)

Social Security Representative Payee Report:
Enter 0

Annual Report:
Enter amount listed in Schedule F

eCOURTS HOME	CASE MANAGEMENT	**UPLOAD DOCUMENT**	CASE JACKET	User: susan.flynn

Upload Documents

Back

▼ Case Details   County Docket No.: ATL-2018   View Case Jacket

Documents Due:

    Documents listed below are either missing or overdue, and therefore need to be uploaded.
- Qualification Documents from Guardian GRAHAM, ALBERT

Select Document Type

* Document Type:	* Filed Date:	* Guardian(s):	* Net Estate Value:	
EZ Accounting Report	11/09/2020	ALBERT GRAHAM		Choose File No file chosen

Back   Continue

Estate Value from Report Review

1. Initial Estate Value comes from the upload of Case Initiation Documents, or from the Inventory, whichever is filed latest. **NOTE**: This value does not change after an Inventory is filed.

2. Current Net Estate Value comes from the most recently filed periodic report (EZ Accounting, Comprehensive Accounting or Annual Report)

3. Net Estate Value for this report comes from the report under review.

NOTE: the net estate value for the report under review is the current net estate value only if it is the most recently filed report.

Case Information

Docket Number	IP Name	Report type	Status
ATL-2018	Gideon Graham	EZ Accounting	New Report

Judgment Date	Filed Date	Initial Estate Value	Current Net Estate Value
11/07/2018	11/08/2019	$22,000 ①	$22,400 ②

Bond Amount	Transaction ID		
$15,000	GMP20201000117		

Quick Links

Case Jacket | EZ Accounting

New Report Review

Answer all questions below based on comparison to the Inventory or the prior year's reporting.

	Yes	No
1. Is the reporting period correct?	○	○
2. Is the correct reporting form used?	○	○
3. Does the report contain all required information?	○	○
4. Do the income and disbursements appear accurate and consistent with the judgment, other orders, and any prior reports?	○	○
5. Do the disbursements match the IP's condition and residential arrangement?	○	○
6. Were any gifts or donations appropriate and consistent with the judgment, other orders, and any prior reports?	○	○
7. Were any fees, commissions, reimbursements or other payments to the guardian or other professionals appropriate and consistent with the judgment, other orders, and any prior reports?	○	○
8. Was any change in ownership of assets reported?	○	○
9. Based on the current estate value, is the bond amount appropriate?	○	○
10. Based on the current estate value and the guardian's relationship with the IP, are the guardian reporting requirements appropriate?	○	○
11. Based on this report, should the guardian's appointment be reviewed?	○	○
12. Are there other areas of concern?	○	○
13. Are there mathematical errors in the report?	○	○
14. Net Estate Value (NEV) for this report ③	$22,400 ⑦	

Updating Net Estate Value in Report Review

The net estate value for the report under review should be updated if the value does not match what is in the report.

1) Make the update
2) Click 'Next'
3) Confirm that you want to edit the net estate value
4) When the review is submitted, the current net estate value will update IF the report was the most recently filed report
5) Click 'Close' to exit the completed review
6) The Estate Value Table will be updated in Case Management

NOTE: if a report that is not the most recent is updated in Report Review, the update will show in the table, but current net estate value will not change.

14. Net Estate Value (NEV) for this report   ① $22,040 ⓘ

② Cancel   Save   Next

Confirm Submission   ✕

⚠ Are you sure you want to edit the Net Estate Value amount?

This will create a new record in the Estate Value ledger within Case Management when review is submitted.

Cancel   **Confirm**   ③

✓ Review submitted.   ⊗

Case Information

Docket Number	IP Name	Report type	Status
ATL-2018	Gideon Graham	EZ Accounting	Pending Final Review
Judgment Date	Filed Date	Initial Estate Value	Current Net Estate Value
11/07/2018	11/08/2019	$22,000	$22,040 ④
Bond Amount	Transaction ID		
$15,000	GMP20201000117		

Case Jacket has been updated with a report summary, transaction ID GMP20201000118

⑤ Close

▼ Estate Value   Initial Estate Value: $ 22,000   Current Net Estate Value: $ 22,040   ⑥

Initial Estate Value: 22,000

Date	Estate Value	Action	Entered By
11/08/2019	$22,040	EZ Accounting Report	susan.flynn
12/26/2018	$22,000	Inventory Report	susan.flynn
08/21/2018	$0	Case Initiation Documents	susan.flynn

Searching for Cases with Net Estate Value

Current Net Estate Value is a column in the workbasket in order to help reviewers identify cases by estate value.

Initial Net Estate Value and Current Net Estate Value can also be used as search criteria in Report Review by clicking on ➕ Add/Change.

New Report Review   Case Review

Search by: ➕ Add/Change   Reset All

There are too many results to display. Please enter additional search criteria to refine the results.

↻ Refresh ⋮   ‹‹ ‹ Page [1] of 50 › ››

	Filed Date ▲	County ⇕	Docket Number ⇕	Report type ⇕	Current Net Estate Value ⇕	Transaction ID ⇕	Status ⇕	
›	2/6/2007	Burlington	3423	Annual Report	0	GMP201624	New Report	Begin
›	2/6/2008	Burlington	3423	Annual Report	0	GMP201625	New Report	Begin
›	2/6/2009	Burlington	3423	Annual Report	0	GMP201626	New Report	Begin
›	2/6/2010	Burlington	3423	Annual Report	0	GMP201627	New Report	Begin

Search by: ➕ Add/Change   Reset All

Search and Filter ✕

Please select search criteria. All criteria are optional fields.

Search Criteria

✕ | Please select ▼

Please select
County
Name
Review Status
Bond
Report type
Emergent
Docket Number
Judgment Date
Initial Estate Value
Current Net Estate Value
Transaction ID
Filed Date

Search

Enter the value range and click 'Search'

The results display in the workbasket.

Search and Filter ✕

Please select search criteria. All criteria are optional fields.

Search Criteria	Minimum:	Maximum:
☒ Current Net Estate Value ▾	10000	50000

╋ Add Search Criteria   Cancel   Reset   **Search**

New Report Review   Case Review

Search by: ╋ Add/Change   Reset All   Current Net Estate Value - Min: **$10,000**   Max: **$50,000** ✕

↻ Refresh ⋮   ≪ ‹ Page 1 of 16 ›

	Filed Date ▲	County ⇕	Docket Number ⇕	Report type ⇕	Current Net Estate Value ⇕	Transaction ID ⇕	Status ⇕	
›	4/16/2013	Warren	2020-26	Inventory	24,555	GMP20201481	New Report	Begin
›	1/7/2015	Warren	GMS-QA-9999	Annual Report	45,344	GMP2020198	New Report	Begin
›	8/17/2016	Essex	cp-0200-2016	Inventory	15,500	GMP2019571	New Report	Begin

NOTE: Initial Estate Value can be used to search, and the results will display but the column headers remain the same (there will not be a column header labeled "Initial Estate Value").

The Initial Estate Value is displayed in the twisty of each case on the workbasket. Open the twisty by clicking the `>` .

New Report Review   Case Review

Search by: **+ Add/Change**   Reset All   Initial Estate Value - Min: **$10,000**   Max: **$50,000** ✖

⟳ Refresh   ⋮   ‹‹ ‹ Page   1   of 8 ›

Filed Date ▲	County ⇕	Docket Number ⇕	Report type ⇕	Current Net Estate Value ⇕	Transaction ID ⇕	Status ⇕	
❯	1/7/2015	Warren	GMS-QA-9999	Annual Report	45,344	GMP2020198	New Report	Begin

⌄	1/7/2015	Warren	GMS-QA-9999	Annual Report	45,344	GMP2020198	New Report	Begin

Docket Number	Name	Judgment Date
GMS-QA-9999	Jack Boss	11/22/2016
Initial Estate Value	Bond	Transaction ID
$45,344	$56,354,367	GMP2020198