

eCourts Guardianship

Estate Value Table Overview January 2021

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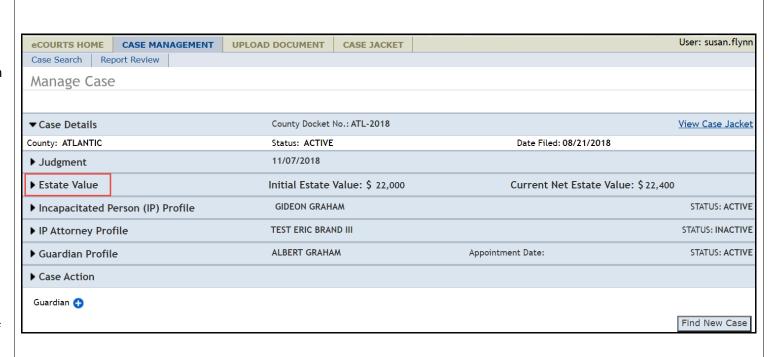
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Estate Value Table Section Overview

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.



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

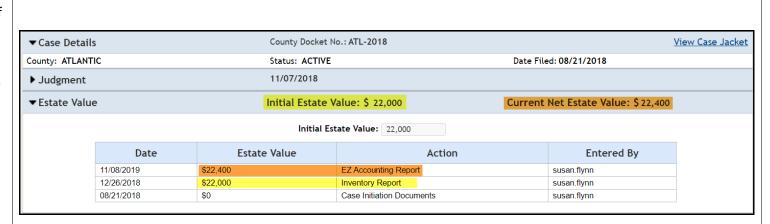
'Initial Estate Value' is the value of the estate at the beginning of the case (Case Initiation Documents or Inventory).

'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
- Updates to the 'Net Estate Value' field in Report Review during the review process.



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:

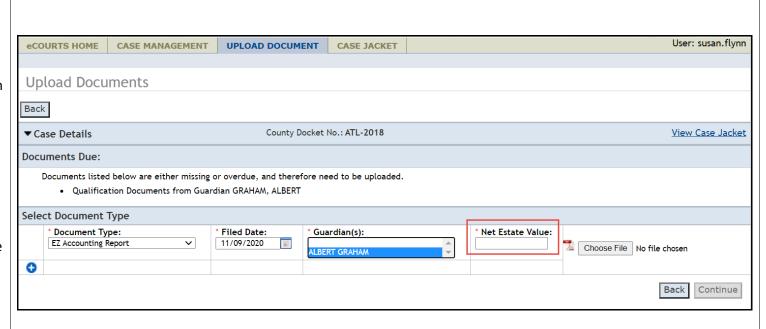
Cash at End of Period (section 2) plus Ending Assets (Part II)

Social Security Representative Payee Report:

Enter 0

Annual Report:

Enter amount listed in Schedule F



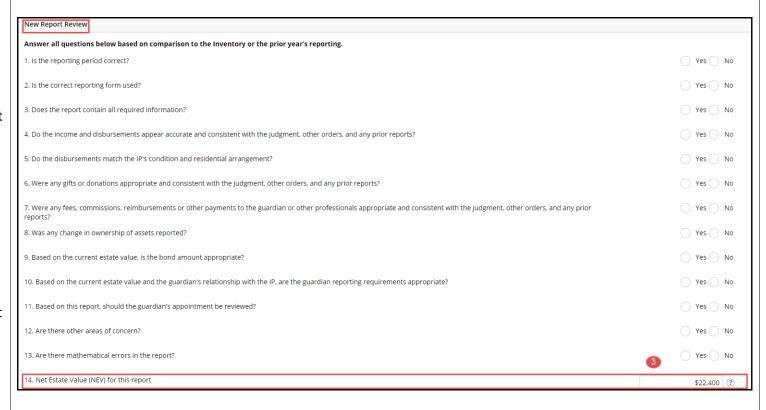


Estate Value from Report Review

- 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.
- 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.



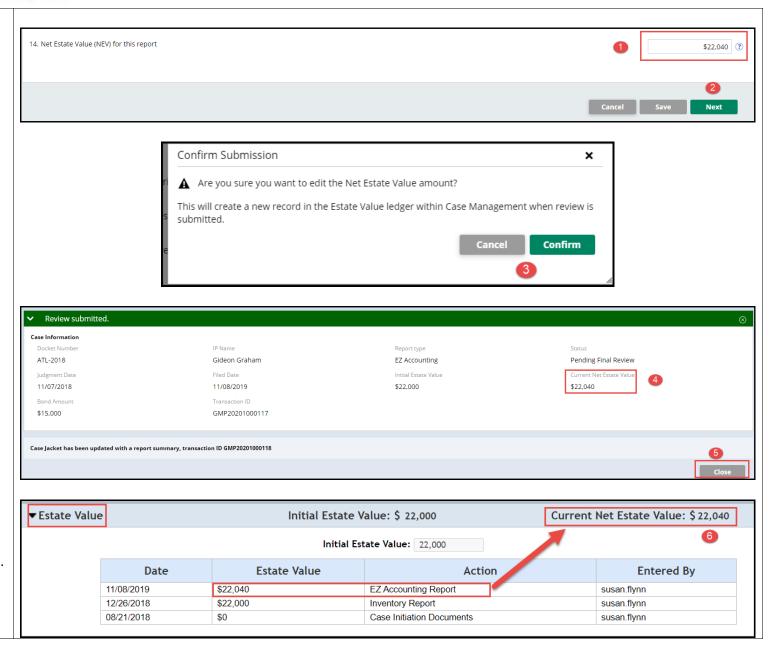


Updating Net Estate Value in Report Review

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
- The Estate Value Table will be updated in Case Management

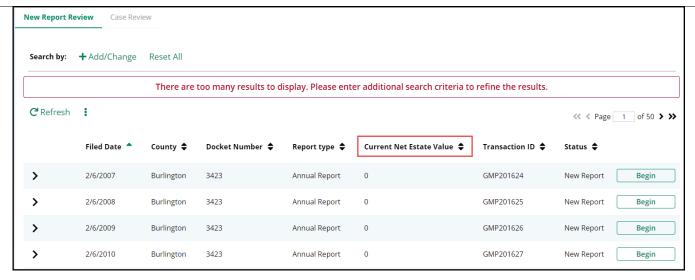
NOTE: if a report that is not the most recent is updated in Report Review, the update will show in the table, but current net estate value will not change.

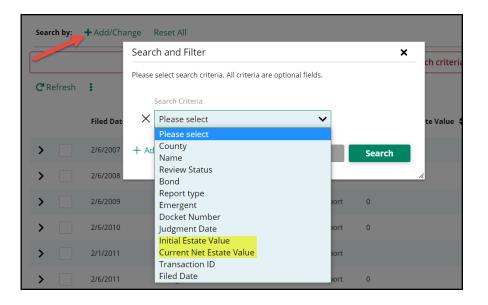


Searching for Cases with Net Estate Value

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

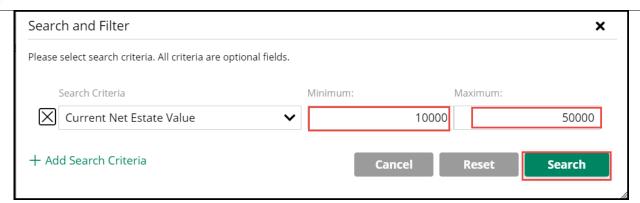
Initial Net Estate Value and
Current Net Estate Value can
also be used as search criteria in
Report Review by clicking on
+ Add/Change

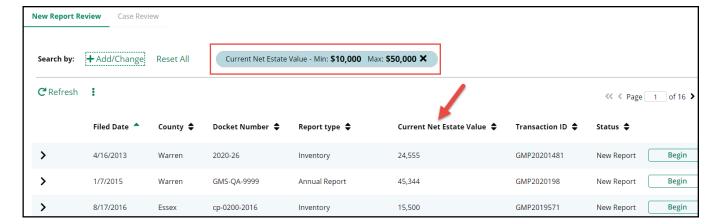




Enter the value range and click 'Search'

The results display in the workbasket.



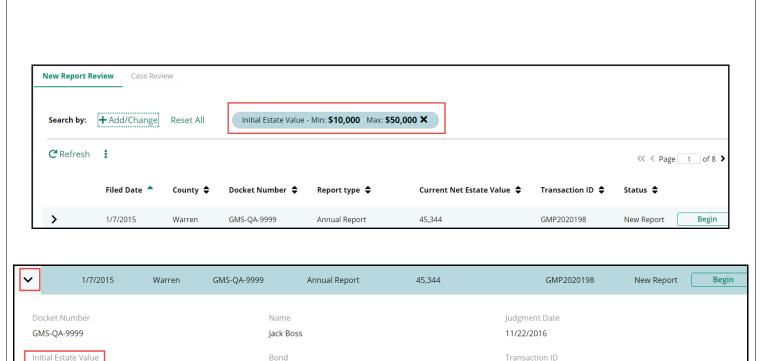




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NOTE: Initial Estate Value can be used to search, and the results will display but the column headers remain the same (there will not be a column header labeled "Initial Estate Value").

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



\$45,344

\$56,354,367