

Login:

Your User ID is either your first and last name OR your FA login.

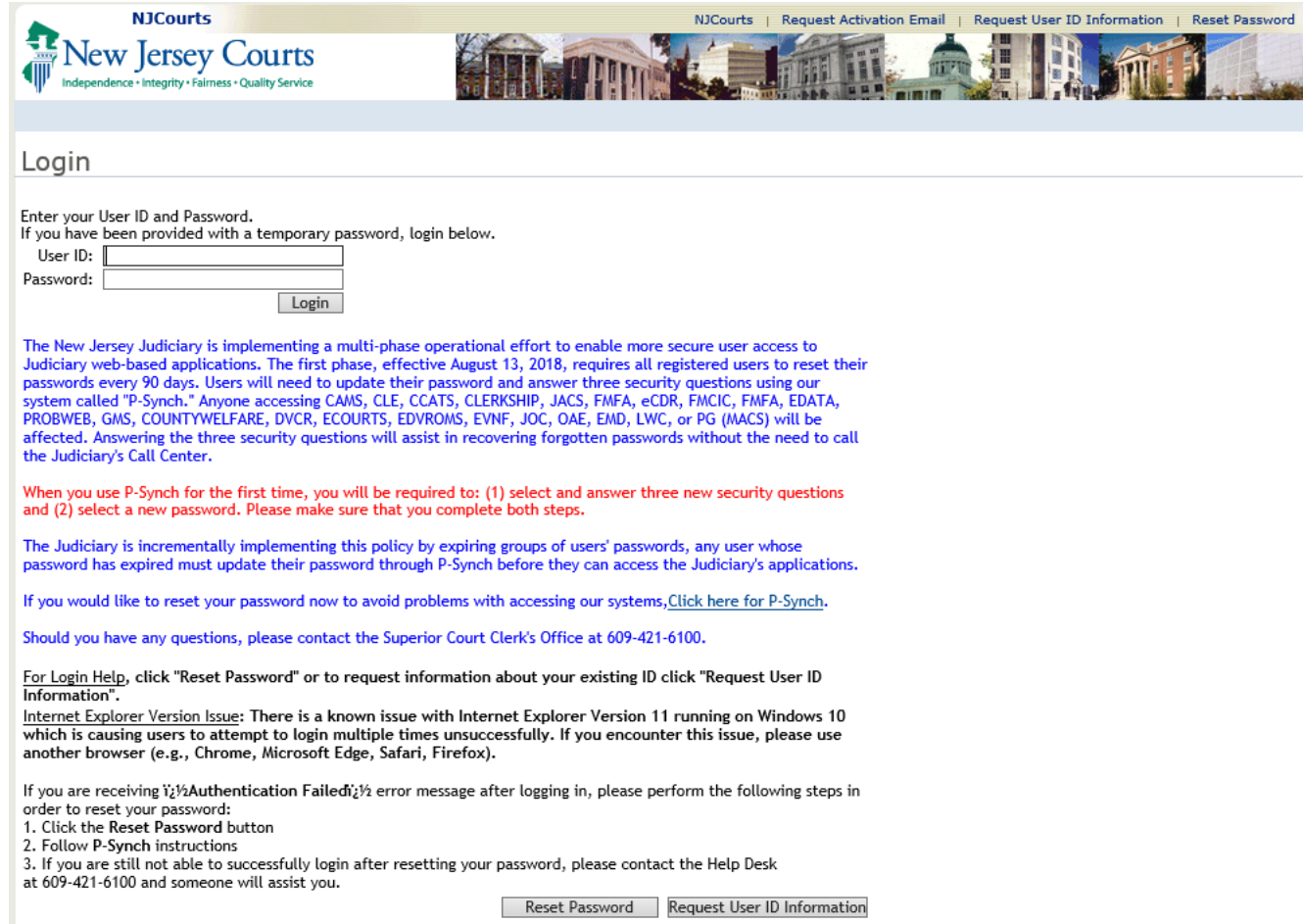
Examples:

janedoe
 cadoe0

If you need to P-Synch or to reset your password, follow the instructions on this screen.

The link for eCourts is:

<https://portal.njcourts.gov/web/1/ecourtsweb/pages/filing/gettingStarted.faces>



The screenshot shows the login interface for the NJCourts eCourts Guardianship Report Review system. At the top, there is a navigation bar with links for "Request Activation Email", "Request User ID Information", and "Reset Password". The main heading is "Login". Below this, users are instructed to enter their User ID and Password. There are input fields for "User ID:" and "Password:", followed by a "Login" button. A "Reset Password" button is also visible at the bottom of the page.

Enter your User ID and Password.
 If you have been provided with a temporary password, login below.

User ID:
 Password:

The New Jersey Judiciary is implementing a multi-phase operational effort to enable more secure user access to Judiciary web-based applications. The first phase, effective August 13, 2018, requires all registered users to reset their passwords every 90 days. Users will need to update their password and answer three security questions using our system called "P-Synch." Anyone accessing CAMS, CLE, CCATS, CLERKSHIP, JACS, FMFA, eCDR, FMCIC, FMFA, EDATA, PROBWEB, GMS, COUNTYWELFARE, DVCR, ECOURTS, EDVROMS, EVNF, JOC, OAE, EMD, LWC, or PG (MACS) will be affected. Answering the three security questions will assist in recovering forgotten passwords without the need to call the Judiciary's Call Center.

When you use P-Synch for the first time, you will be required to: (1) select and answer three new security questions and (2) select a new password. Please make sure that you complete both steps.

The Judiciary is incrementally implementing this policy by expiring groups of users' passwords, any user whose password has expired must update their password through P-Synch before they can access the Judiciary's applications.

If you would like to reset your password now to avoid problems with accessing our systems, [Click here for P-Synch](#).

Should you have any questions, please contact the Superior Court Clerk's Office at 609-421-6100.

For [Login Help](#), click "Reset Password" or to request information about your existing ID click "Request User ID Information".


Internet Explorer Version Issue: There is a known issue with Internet Explorer Version 11 running on Windows 10 which is causing users to attempt to login multiple times unsuccessfully. If you encounter this issue, please use another browser (e.g., Chrome, Microsoft Edge, Safari, Firefox).

If you are receiving "Authentication Failed" error message after logging in, please perform the following steps in order to reset your password:

1. Click the **Reset Password** button
2. Follow P-Synch instructions
3. If you are still not able to successfully login after resetting your password, please contact the Help Desk at 609-421-6100 and someone will assist you.


Verify Information and Enter Email Address

- 1) Users will not receive email notifications from eCourts Guardianship.
- 2) Click the certification checkbox.
- 3) Click 'Continue'.



New Jersey Courts
Independence • Integrity • Fairness • Quality Service

Judiciary eCourts System - Guardianship



[My Account](#) | [Home](#) | [Help](#) | [Logout](#)

User:

Judiciary Help Desk: 609-421-6100
 eCourts Support: 8:00 AM - 5:00 PM Normal Business Days

Verify Information and Enter Email Address

eFiling Contact Information

Please verify the following information to begin electronic filing.
 Please review or edit, if necessary, the email addresses for electronic notification. All filing correspondence and notification will be sent to email addresses provided.
 To return to Registration & Contact Information, please click 'My Account' above.

Agency Name and Address *	Email Addresses for Electronic Notifications
25 Market St. Trenton, NJ 08625	<div style="display: flex; flex-direction: column;"> <div style="display: flex; align-items: flex-start;"> * Email 1 <input style="width: 80%;" type="text" value="susanflynn@njcourts.gov"/> 1 </div> <div style="display: flex; align-items: flex-start; margin-top: 5px;"> Email 2 <input style="width: 80%;" type="text"/> </div> <div style="display: flex; align-items: flex-start; margin-top: 5px;"> Email 3 <input style="width: 80%;" type="text"/> </div> </div>

Certification of Information

I certify that all the information is true and accurate. 3

2
Continue

eCourts Guardianship Home Page

Case Management contains 2 sub-tabs:

- 1) Case Search
- 2) Report Review

Click on Report Review. Report Review will open in a new tab.

To navigate back to Case Management to search for a case, click on the eCourts tab.

The screenshot shows the 'Judiciary eCourts System - Guardianship' interface. At the top, there is a navigation bar with 'Home' and 'Help' links. Below this is the 'New Jersey Courts' logo and a secondary navigation bar with tabs: 'eCOURTS HOME', 'CASE MANAGEMENT' (highlighted with a red box), 'UPLOAD DOCUMENT', and 'CASE JACKET'. A 'User:' field is visible on the right. Below the navigation bar, there are sub-tabs: 'Case Search' and 'Report Review' (highlighted with a red box). The main content area is titled 'Manage Case' and contains a red warning message: 'Only alphabetic characters can be entered in name fields.' Below this, there are two search options: 1) 'Search for County Docket Number (exact):' with a text input field and a 'Search' button. 2) 'OR' followed by 'Search for Incapacitated Person:' with fields for '* First Name' and '* Last Name', and 'Reset' and 'Search' buttons.

Report Review Workbasket

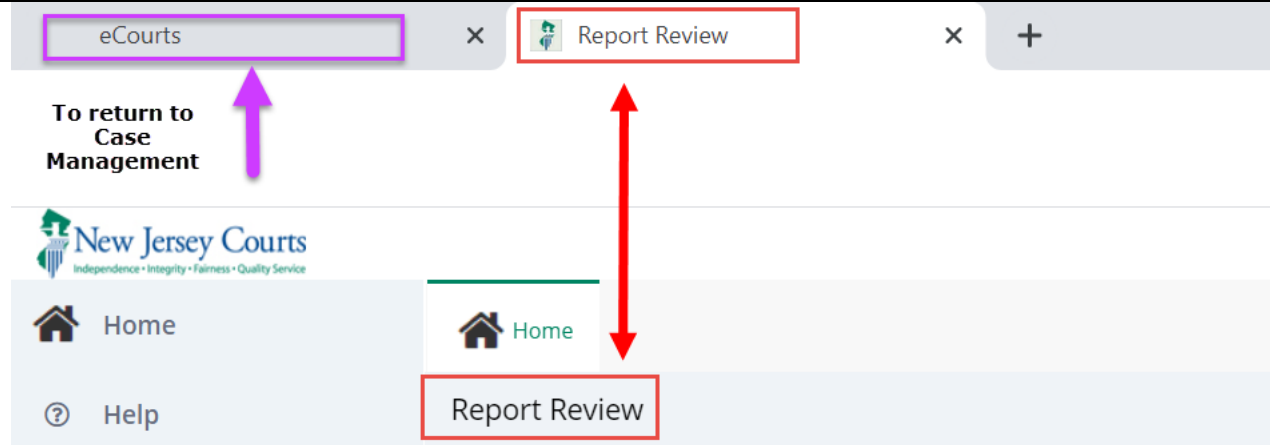
The reports display in the Workbasket after they are uploaded to the Case Jacket.

Inventories, EZ Accountings, Comprehensive Accountings and Annual Reports are the only reports that are reviewed in Report Review.



Clicking on the icon returns users to the Home screen.

- 1) Filed Date - the date the report was stamped filed
- 2) County – users will see reviews for each county they work in
- 3) Name – IP Name
- 4) Report type – Type of accounting



Home Screen Displays the Workbasket

Home

Help

Recents
No history

Report Review

New Report Review

Refresh



Page 1 of 11

Filed Date	County	Name	Report type	Bond	Transaction ID	Status	Action
8/17/2016	Essex	Ruby Tuesday	Inventory	\$20,000	GMP2019571	New Report	Begin
11/23/2016	Essex	Ruby Tuesday	EZ Accounting	\$20,000	GMP2019572	New Report Draft	Continue
3/8/2017	Essex	Olivia Emerson	Inventory	\$0	GMP2019659	New Report	Begin
5/11/2017	Essex	Esx02 Esx20	Inventory	\$0	GMP2017595	New Report	Begin
7/12/2017	Essex	Kasey Carnes	Inventory	\$0	GMP20196130	New Report	Begin
9/5/2017	Essex	Joseph Jones	Inventory	\$0	GMP2019566	New Report	Begin
9/7/2017	Essex	Joseph Jones	EZ Accounting	\$0	GMP2019567	New Report	Begin

- 5) Bond – displays the most recent Bond (or Amended Bond) amount
- 6) Transaction ID – Assigned to the report at upload
- 7) Status – displays the status of the review
- 8) The action buttons correspond to the status of the review
 - a. Begin for 'New Report'
 - b. Continue for 'New Report Draft'

Help
 Clicking on 'Help' will display Help topics.

Managing the Workbasket

- 1) The reviews display with the oldest Filed Date at the top of the Workbasket.
- 2) The sort for each column can be changed by clicking the  icon.
- 3) Each column can also be filtered by clicking the  icon.
- 4) To see additional pages of reviews, click on the arrows.

NOTE: the sort/filter will revert to the default settings each time the user navigates away from the Workbasket.

Report Review

New Report Review

Refresh

Page 1 of 11

1 Filed Date	2 County	3 Name	4 Report type	5 Bond	6 Transaction ID	7 Status	8
> 8/17/2016	Essex	Ruby Tuesday	Inventory	\$20,000	GMP2019571	New Report	Begin
> 11/23/2016	Essex	Ruby Tuesday	EZ Accounting	\$20,000	GMP2019572	New Report Draft	Continue
> 3/8/2017	Essex	Olivia Emerson	Inventory	\$0	GMP2019659	New Report	Begin
> 5/11/2017	Essex	Esx02 Esx20	Inventory	\$0	GMP2017595	New Report	Begin
> 7/12/2017	Essex	Kasey Carnes	Inventory	\$0	GMP20196130	New Report	Begin
> 9/5/2017	Essex	Joseph Jones	Inventory	\$0	GMP2019566	New Report	Begin
> 9/7/2017	Essex	Joseph Jones	EZ Accounting	\$0	GMP2019567	New Report	Begin

Home

Help

Tips

The Workbasket can be filtered to locate:

- All reports for an Incapacitated Person
- Particular types of reports
- A specific report

NOTE: Transaction IDs are unique. All reports receive a Transaction ID at upload and this ID never changes. The Transaction ID is located in Case Jacket as well as in Report Review.

NOTE: Multiple filters can be applied at the same time.

New Report Review

Refresh

Page 1 of 11

Filed Date	County	Name	Report type	Bond	Transaction ID	Status	
8/17/2016	Essex	Ruby Tuesday	Inventory	\$20,000	GMP2019571	New Report	Begin
11/23/2016	Essex	Ruby Tuesday	EZ Accounting	\$20,000	GMP2019572	New Report Draft	Continue
3/8/2017	Essex	Olivia Emerson	Inventory	\$0	GMP2019659	New Report	Begin

Filter 'Filed Date' by date range or relative date (i.e., previous month):

Refresh

Filed Date County Name Report

Transaction ID Status

Clear Filter

From

To

Select relative date

Apply Cancel

Select relative date

- Calendar month**
 - Previous month
 - Current month
 - Next month
 - Current and previous month
 - Current and next month
- Calendar quarter**
 - Current quarter
 - Current and next quarter
 - Current and previous quarter
 - Next quarter
 - Previous quarter
- Calendar week**
 - Previous week
 - Current week
 - Next week
- Calendar year**
 - Current year
 - Previous year

Tabs

Clicking on a 'Begin' or 'Continue' action button in the Workbasket opens a review in a new tab.

4 Tabs can be open at any time.

Clicking on the report type tab will navigate the user to the report review screen.

To close a review, click the "X" in the tab.

If a review is open in a tab, and the user tries to open it again from the Workbasket, a Pop-up displays. Click 'Cancel' to avoid losing any unsaved work in the review.

Refresh

Filed Date	County	Name	Report type
> 8/17/2016	Essex		Inventory
> 11/23/2016	Essex		EZ Accounting
> 3/8/2017	Essex		Inventory
> 5/11/2017	Essex		Inventory

Filter pop-up: Clear Filter, Search Text: Ruby Tuesday, Apply, Cancel

Results:

Filed Date	County	Name	Report type	Bond	Transaction ID	Status	
> 8/17/2016	Essex	Ruby Tuesday	Inventory	\$20,000	GMP2019571	New Report	Begin
> 11/23/2016	Essex	Ruby Tuesday	EZ Accounting	\$20,000	GMP2019572	New Report Draft	Continue
> 10/25/2017	Essex	Ruby Tuesday	EZ Accounting	\$20,000	GMP2019573	New Report	Begin

To find a specific report, filter by the Transaction ID:


Filed Date	County	Name	Report type	Bond	Transaction ID	Status
> 8/17/2016	Essex	Ruby Tuesday	Inventory	\$20,000		
> 11/23/2016	Essex	Ruby Tuesday	EZ Accounting	\$20,000		
> 3/8/2017	Essex	Olivia Emerson	Inventory	\$0		
> 5/11/2017	Essex	Esx02 Esx20	Inventory	\$0		

Filter pop-up: Clear Filter, Search Text: GMP20196130, Apply, Cancel


Results:

Filed Date	County	Name	Report type	Bond	Transaction ID	Status	
> 7/12/2017	Essex	Kasey Carnes	Inventory	\$0	GMP20196130	New Report	Begin

Other Features

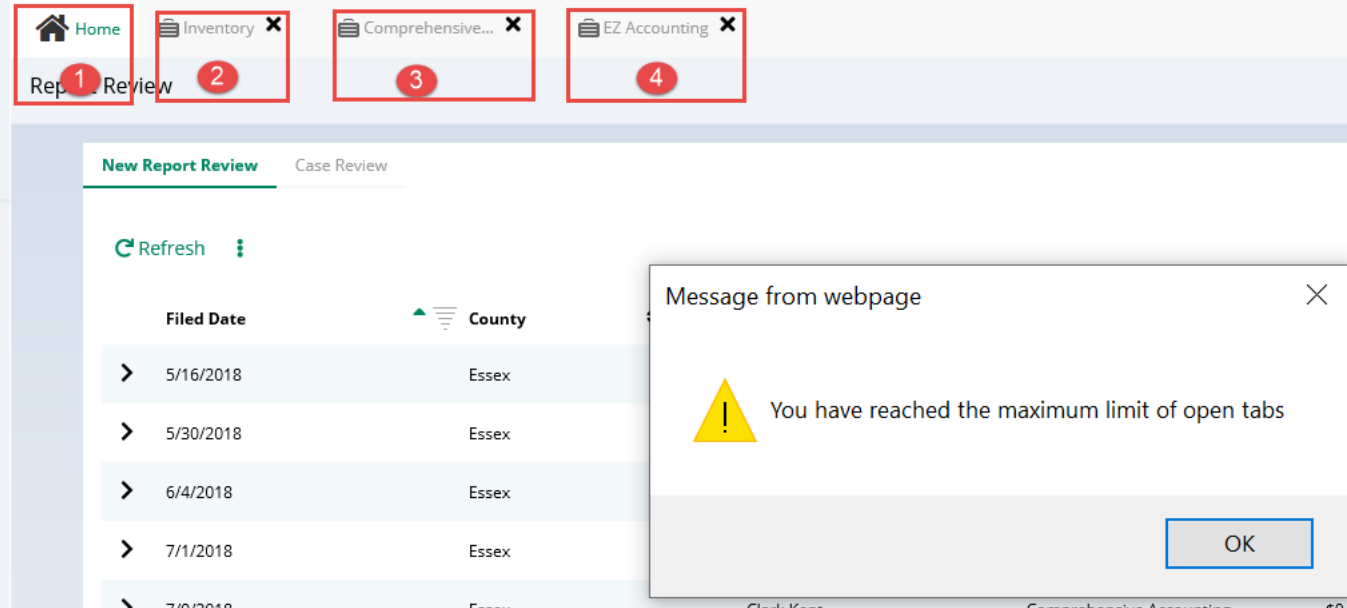
Clicking the  icon on the right side of the Workbasket screen opens a menu.

The menu displays options:

Clicking the  icon returns the user to the Workbasket screen.

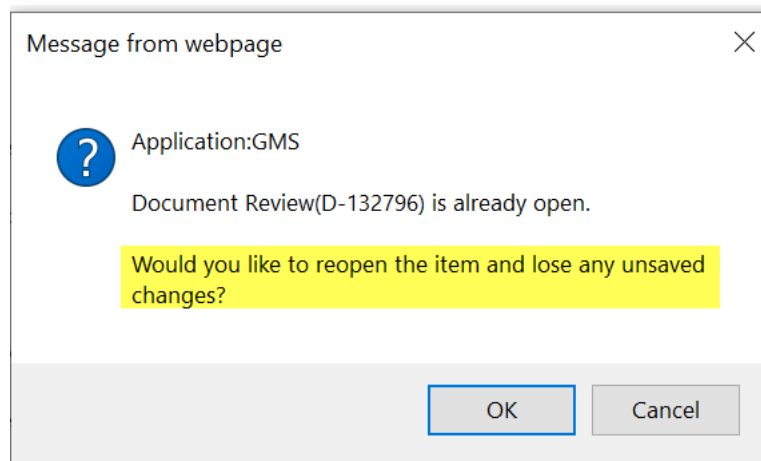
Reports listed in the menu correspond to report reviews opened in tabs. Clicking the report name will navigate the user to the report review screen.

Clicking 'Close All' will close all open tabs, except for the Home Workbasket screen.




The screenshot shows the top navigation bar with four tabs: 'Home', 'Inventory', 'Comprehensive...', and 'EZ Accounting'. Below the tabs is a 'New Report Review' section with a table of reports. A dialog box titled 'Message from webpage' is overlaid on the screen, displaying a yellow warning triangle and the text: 'You have reached the maximum limit of open tabs'. An 'OK' button is visible at the bottom right of the dialog.

Filed Date	County
> 5/16/2018	Essex
> 5/30/2018	Essex
> 6/4/2018	Essex
> 7/1/2018	Essex
> 7/2/2018	Essex




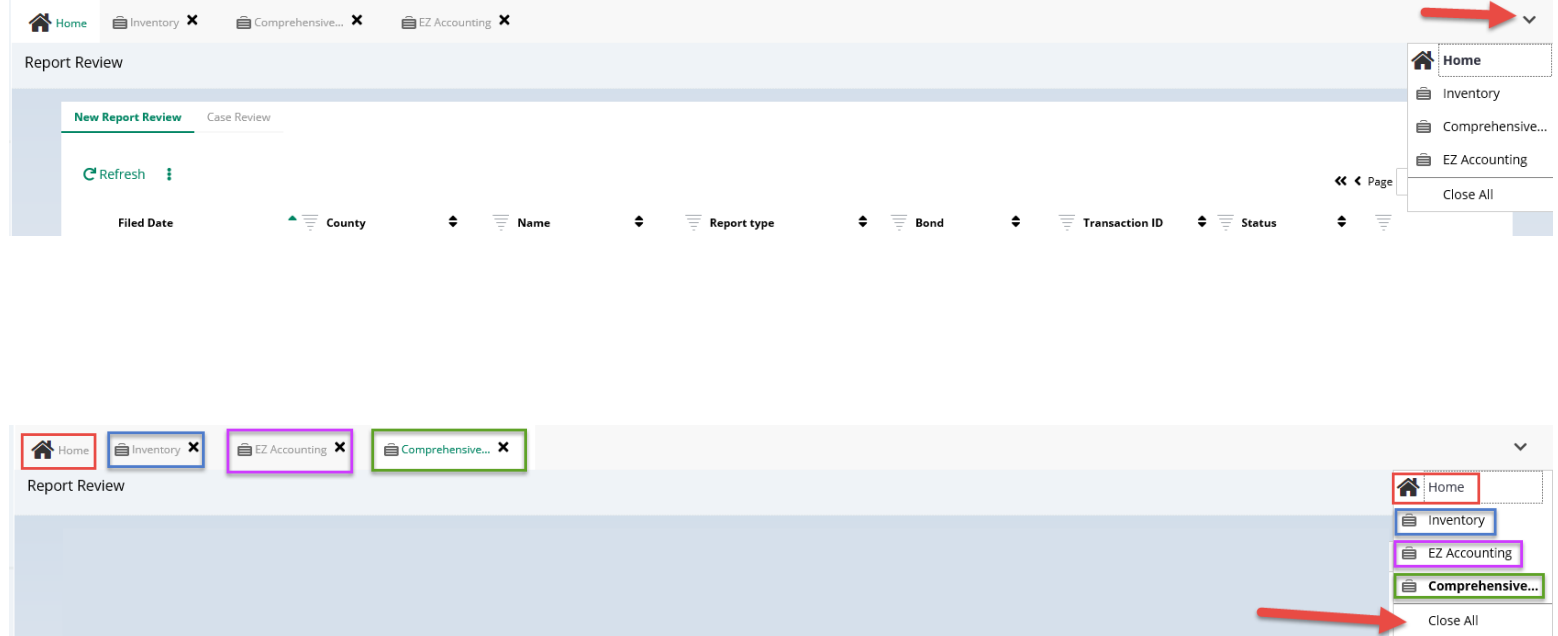
The screenshot shows a dialog box titled 'Message from webpage' with a question mark icon. The text inside reads: 'Application:GMS Document Review(D-132796) is already open.' Below this, a yellow highlighted box contains the text: 'Would you like to reopen the item and lose any unsaved changes?'. At the bottom, there are 'OK' and 'Cancel' buttons.

Clicking the  icon next to a review opens a section containing additional information:

- Docket Number
- Judgment Date (Initial Judgment)
- Initial Estate Value (if any)
- Current Net Estate Value (if any)
- Transaction ID

NOTE: The Initial Estate Value and Current Net Estate Value fields may be blank. The value fields are also found in the Estate Value twisty in Case Management.

Clicking the  icon again will close this section.



The screenshot displays the 'Report Review' interface. At the top, there are tabs for 'Home', 'Inventory', 'Comprehensive...', and 'EZ Accounting'. Below the tabs, the 'New Report Review' section is expanded, showing a 'Case Review' area with a 'Refresh' button and a table of reports. The table has columns for 'Filed Date', 'County', 'Name', 'Report type', 'Bond', 'Transaction ID', and 'Status'. A red arrow points to a chevron right icon in the top right corner of the interface. Below the table, there are more tabs for 'Home', 'Inventory', 'EZ Accounting', and 'Comprehensive...'. A second red arrow points to a chevron right icon in the bottom right corner of the interface.

Only 1 user may be working in a review at a time. A message displays if the review is already in use.

NOTE: All users in the same county see the same Workbasket. Users do not have individual Workbaskets.

New Report Review Case Review

Refresh

Page 1 of 11

Filed Date	County	Name	Report type	Bond	Transaction ID	Status
8/17/2016	Essex	Ruby Tuesday	Inventory	\$20,000	GMP2019571	New Report

Begin

Docket Number: cp-0200-2016
 Judgment Date: 1/28/2016
 Initial Estate Value
 Current Net Estate Value
 Transaction ID: GMP2019571

Starting a Review

Click on:

- 'Begin' to start a new review; OR
- 'Continue' to complete a review that is in progress

Status:

'New Report' means no work has been done on the review.

'New Report Draft' means a user has begun the review and the work has been saved as a draft.

 The Review of :

EZ Accounting

GMP2020389

Artie Blank

union-10003

is currently being modified by :

Eric Dawson

Performing the Review

The review contains 3 sections:

- Case Information
- Review questions
- Audit (discussed last)

Case Information Section

- Docket Number
- IP Name
- Report type
- Status
- Judgment Date
- Filed Date
- Bond Amount
- Transaction ID

Quick Links: Clicking on Case Jacket will open Case Jacket in a new tab. Clicking on the report name opens the report under review in a pop-up window (future development).

New Report Review

Refresh

Filed Date	County	Name	Report type	Bond	Transaction ID	Status	
> 8/17/2016	Essex	Ruby Tuesday	Inventory	\$20,000	GMP2019571	New Report	Begin
> 11/23/2016	Essex	Ruby Tuesday	EZ Accounting	\$20,000	GMP2019572	New Report Draft	Continue
> 10/25/2017	Essex	Ruby Tuesday	EZ Accounting	\$20,000	GMP2019573	New Report	Begin
> 8/15/2018	Essex	Ruby Tuesday	Annual Report	\$20,000	GMP2019574	New Report	Begin

Review questions - Inventory

The review questions are different depending on the report type.

‘Enter Net Estate Value (NEV)’ – this field may be blank, or it may contain a value entered when the Inventory was uploaded to the Case Jacket.

If it is blank, enter the value from the Inventory (see right).

If the value is incorrect based on what the guardian reported, update the field.

If it is correct, do not make any changes to the value.

Case Information

Case Information			
Docket Number	IP Name	Report type	Status
cp-0200-2016	Ruby Tuesday	Inventory	New Report
Judgment Date	Filed Date	Initial Estate Value	Current Net Estate Value
01/28/2016	08/17/2016		
Bond Amount	Transaction ID		
\$20,000	GMP2019571		

Quick Links	
Case Jacket	Inventory

NOTE: ‘Initial Estate Value’ and ‘Current Net Estate Value’ may be blank.

Each question requires a response. Depending on the response, other fields may display, for example:

- 1) The reporting period is correct; no additional fields display
- 2) The reporting form is incorrect; the 'Issues' menu displays
- 3) If the issue requires review by a judge, select 'Emergent'
- 4) A brief comment is required

NOTE: when there is only 1 issue in the dropdown menu, it automatically populates the 'Issues' box.

If there are multiple issues available, click on the dropdown menu and select each (issues must be selected one at a time).

New Report 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
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. Enter Net Estate Value (NEV)

Excerpt from the Inventory Report:

Recapitulation

Schedule A - Real Property	\$	<input style="width: 100px;" type="text"/>
Schedule B - Stocks, Bonds, Mutual Funds, Securities and Investment Accounts	\$	<input style="width: 100px;" type="text"/>
Schedule C - Cash, Bank Accounts, Notes Due	\$	<input style="width: 100px;" type="text"/>
Schedule D - Pensions, Retirement Accounts, Annuities, Profit Sharing Plans	\$	<input style="width: 100px;" type="text"/>
Schedule E - Miscellaneous Personal Property	\$	<input style="width: 100px;" type="text"/>
Gross Value	\$	<input style="width: 100px;" type="text"/>
Schedule F - Encumbrances	\$ (<input style="width: 100px;" type="text"/>)
Total Net Estate	\$	<input style="width: 100px;" type="text"/>
Schedule G - Monthly Income	\$	<input style="width: 100px;" type="text"/>

To remove 1 issue, click on the "X". To clear all the issues selected, click 'Clear'.

'Additional Review Required?'

This question only displays if at least 1 issue is identified in a review.

If any issue is identified in a review as 'Emergent', then the 'Additional Review Required?' question will display with 'Yes' automatically selected.

New Report Review

Answer all questions below based on comparison to the Certification of Assets.

1. Is the reporting period correct? Yes No 1

2. Is the correct reporting form used? Yes No 2

Emergent? 3

Issues: Wrong form used X Clear

Comment/Explanation: 4

Remaining: 150 characters

4. Is the information reported consistent with the income/assets/liabilities/encumbrances reported in the Certification of Assets? Yes No 5

Emergent?

Issues: Clear

- Schedule A: Real Property 6
- Schedule B: Stocks, Bonds, Mutual Funds
- Schedule C: Cash, Bank Accounts, Notes Due
- Schedule D: Pensions, Retirement Accounts
- Schedule E: Misc. Personal Property 7
- Schedule F: Encumbrances 8
- Total Net Estate
- Schedule G: Income

If an issue is identified, but 'Emergent' is not selected, 'Additional Review Required?' displays and the user selects 'Yes' or 'No' to indicate if the review needs additional review.

When 'Yes' is selected, a comment box displays, and a brief explanation is required.

When 'No' is selected, no comment box displays.

If additional review is required, the review will proceed to the next level of review with the status 'Pending Finance Review'.

If no additional review is required, the review will display the status 'Pending Final Review'."

4. Is the information reported consistent with the income/assets/liabilities/encumbrances reported in the Certification of Assets? Yes No

Emergent?

Issues

Schedule A: Real Property ✕ Schedule F: Encumbrances ✕ Schedule E: Misc. Person... ✕ Clear

Comment/Explanation

Comment/Explanation

Remaining: 150 characters

9. Are there other areas of concern? Yes No

Emergent?

Issues

Guardian has not identifi... ✕ Clear

Comment/Explanation

The guardian has not identified, traced or collected the IP's assets. The IP's assets are all being held by her former spouse.]

Remaining: 23 characters

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

11. Enter Net Estate Value (NEV)

Additional Review Required? Yes No

Clicking Clear removes all issues selected

Emergent?

Additional Review Required? Yes No

Completing the Review

When the review is complete, click the 'Next' button.

NOTE: if there are unanswered questions, an error message will display.

Guidance: For guidance on answering the questions, refer to refer to the eCourts Guardianship Report Review FAQ and the 'Help' link (future development).

A non-emergent issue is identified:

9. Are there other areas of concern?

Emergent?

Issues

Guardian has not identifi... x

Clear

Comment/Explanation

The guardian has not identified, traced or collected the IP assets. The IP's assets are being held by her former spouse.

Remaining: 29 characters

10. Are there mathematical errors in the report?

Yes No

11. Enter Net Estate Value (NEV)

Additional Review Required?

Yes No

A non-emergent issue is identified, and additional review is required:

Additional Review Required?

Yes No

Comments

Comment/Explanation

Remaining: 150 characters

A non-emergent issue is identified, and no additional review is required:

Additional Review Required?

Yes No

After clicking 'Next', a read-only review screen displays.

Review all answers. If they are accurate, click 'Submit'.

To make changes, click 'Back' to return to the review work screen.

If no issues were identified, a 'Certification of Information' displays and must be checked.

After clicking 'Submit', a 'Confirm Submission' Pop-up will display. Click 'Confirm' to submit your review.

To return to the read only review screen, click 'Cancel'.

NOTE: no changes can be made after clicking 'Confirm'.

Home Inventory x

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
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. Enter Net Estate Value (NEV)

Cancel Save **Next**

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

*** This field may not be blank**

11. Enter Net Estate Value (NEV)

*** This field may not be blank**

Completed Reviews

After a review is submitted, a confirmation screen displays.

Clicking 'Close' returns the user to the Workbasket screen.

NOTE:

- 1) The 'Status' of the review now reflects that the new report review is complete. This review will no longer display in the New Report Review Workbasket.
- 2) The 'Current Net Estate Value' field was updated with the value entered during the review.
- 3) A PDF summary of the review is saved to the Case Jacket. The Transaction ID is provided. To see the review, open the Case Jacket for the case and search for the Transaction ID.

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?	Yes
4. Is the information reported consistent with the income/assets/liabilities/encumbrances reported in the Certification of Assets?	Yes
5. Do the liabilities/encumbrances match the IP's condition and residential arrangement?	Yes
6. Based on the current estate value, is the bond amount appropriate?	Yes
7. Based on the current estate value and the guardian's relationship with the IP, are the guardian reporting requirements appropriate?	Yes
8. Based on this report, should the guardian's appointment be reviewed?	No
9. Are there other areas of concern?	No
10. Are there mathematical errors in the report?	No
11. Enter Net Estate Value (NEV)	\$15,500

Certification of Information

I certify that this report has been reviewed by me and acknowledge that there are no issues identified.

Back

Submit


Once 'Confirm' is clicked, the review cannot be rolled back.

Confirm Submission ✕

You are about to submit the report review of Inventory Report in Docket cp-0200-2016. No additional changes to this review will be possible.

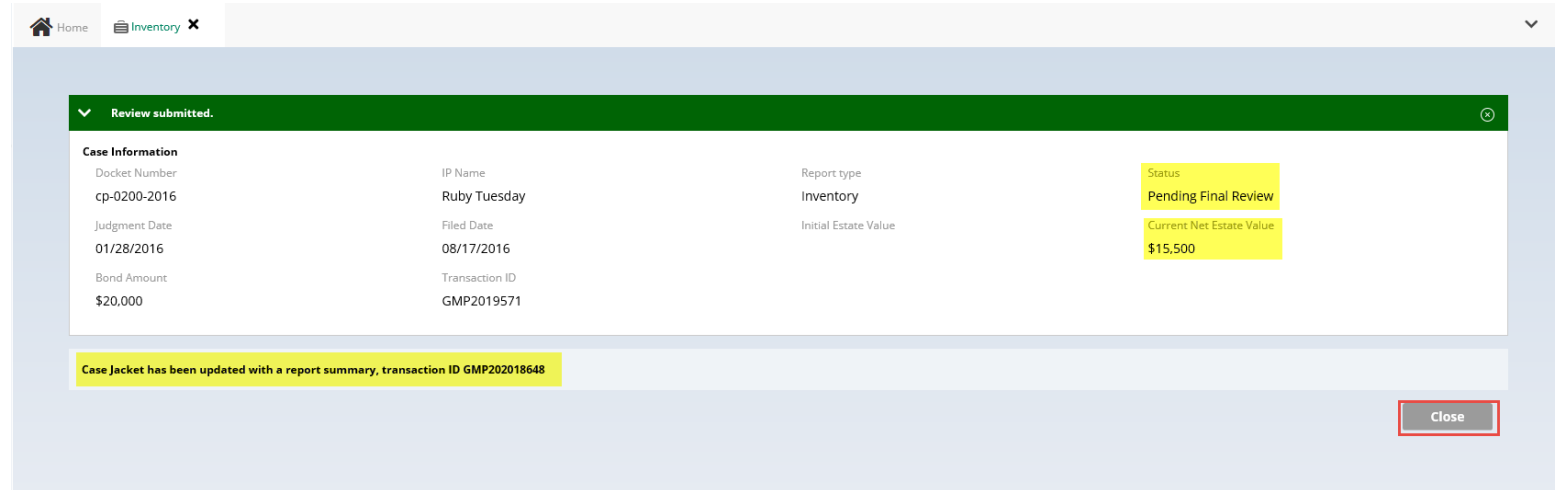
The Review Summary

Locate the review in the Case Jacket by searching.

Click the  icon to open the summary in a pop-up window.

The Summary contains a Case Information section as well as the review summary.

- 1) The name of the reviewer, and date and time of the completion
- 2) Issues identified (if any)
- 3) The Current Net Estate Value



The screenshot shows a web interface with a navigation bar at the top containing 'Home' and 'Inventory' (with a close icon). Below the navigation bar is a green notification banner that reads 'Review submitted.' with a close icon. Underneath the notification is a table titled 'Case Information' with the following data:

Case Information		Report type	Status
Docket Number	IP Name	Inventory	Pending Final Review
cp-0200-2016	Ruby Tuesday	Initial Estate Value	Current Net Estate Value
Judgment Date	Filed Date		\$15,500
01/28/2016	08/17/2016		
Bond Amount	Transaction ID		
\$20,000	GMP2019571		

Below the table is a yellow notification banner that reads 'Case Jacket has been updated with a report summary, transaction ID GMP202018648'. At the bottom right of the interface is a 'Close' button.

Estate Value

If the 'Current Net Estate Value' field in Report Review is changed, the change will be reflected in the Estate Value section in Case Management.

CASE JACKET User:

Docket Number: CP-0200-2016


[Back](#) [Create Summary Report](#)

IP Name: RUBY TUESDAY **Venue:** ESSEX **Court Type:** GUARDIANSHIP
Filed Date: 01/04/2016 **Case Status:** ACTIVE **Case Type:**
Guardianship Type: PERSON GENERAL(PLENARY) - ESTATE GENERAL(PLENARY) **Judgment Date:** 01/28/2016 **Judge:** HON. WALTER KOPROWSKI, JR., J.S.C.

IP Others (1)

▶ RUBY TUESDAY Party Type: INCAPACITATED PERSON Party Status :ACTIVE

Case Actions Search: x

Filing Date ▲	Filings	Docket Text	Transaction ID	Entry Date	Entered By
08/17/2016		Report Review - New Report Review RE: Inventory [GMP2019571]	GMP202018648	07/16/2020	susan.flynn

Clicking the paperclip icon will open the summary in a new window:



Guardian Report Review : New Report Review Summary

Docket Number:	cp-0200-2016	Initial Estate Value:	\$
IP Name:	Ruby Tuesday	Current NEV:	\$ 15,500
Report Type:	Inventory	Bond Amount:	\$ 20,000
Judgment Date:	01/28/2016	Transaction ID:	GMP2019571
Filed Date:	08/17/2016	Summary Submitted:	07/16/2020

New Report Review Summary

Submitted by: susan.flynn on 07/16/2020 09:33:12 AM 1

No issues have been identified for this report. 2

Current Net Estate Value: \$ 15,500 3

If the value field was populated, an update in Report Review replaces the original value:

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

Case Search Report Review

Manage Case

▼ Case Details County Docket No.: cp-0200-2016 [View Case Jacket](#)

County: ESSEX Status: ACTIVE Date Filed: 01/04/2016

► Judgment 01/28/2016

► Estate Value Initial Estate Value: \$ 15,500 Current Net Estate Value: \$ 15,500

► Incapacitated Person (IP) Profile RUBY TUESDAY STATUS: ACTIVE

► IP Attorney Profile PHOEBE CHRISTIAN BENTLEY STATUS: INACTIVE

► Guardian Profile GARNET TUESDAY Appointment Date: STATUS: ACTIVE

► Case Action

Guardian +

[Find New Case](#)

If the value field was blank, an update in Report Review populates the field:

▼ Case Details County Docket No.: cp-0200-2016 [View Case Jacket](#)

County: ESSEX Status: ACTIVE Date Filed: 01/04/2016

► Judgment 01/28/2016

▼ Estate Value Initial Estate Value: \$ 15,500 Current Net Estate Value: \$ 15,500

Initial Estate Value:

Date	Estate Value	Action	Entered By
08/17/2016	\$15,500	Inventory Report	susan.flynn

Review Questions – Periodic Reports

Periodic Reports (EZ Accounting, Comprehensive Accounting, Annual Report) all have the same set of questions, but the Issues list that displays is different based on the report type.

Aside from the differences in questions and issues, the review process for all reports, including inventories, is the same.

Original value:

▼ Estate Value		Initial Estate Value: \$ 54,542,512	Current Net Estate Value: \$ 98,789
		Initial Estate Value: <input type="text" value="54,542,512"/>	
		First << 1 2 >> Last	
Date	Estate Value	Action	Entered By
05/07/2020	\$98,789	EZ Accounting Report	sudeepthi.vasamsetti

The original value has been replaced by the entry made in Report Review:

▼ Estate Value		Initial Estate Value: \$ 54,542,512	Current Net Estate Value: \$ 89,789
		Initial Estate Value: <input type="text" value="54,542,512"/>	
		First << 1 2 >> Last	
Date	Estate Value	Action	Entered By
05/07/2020	\$89,789	EZ Accounting Report	susan.flynn

Other Features

If 'Cancel' is clicked, a 'Discard Changes?' pop-up will display with instructions.

Clicking 'Yes' closes the review without saving any changes and the review will return to the Workbasket in the same status it was in prior to being opened.

Example: If a review in 'New Report' status is opened by mistake, clicking 'Yes' will return it to the Workbasket in 'New Report' status.

Clicking 'No' allows the user to return to the work screen to complete the review or to save changes.

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

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. Do the income and disbursements appear accurate and consistent with the judgment, other orders, and any prior reports? Yes No
5. Do the disbursements match the IP's condition and residential arrangement? Yes No
6. Were any gifts or donations appropriate and consistent with the judgment, other orders, and any prior reports? Yes No
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? Yes No
8. Was any change in ownership of assets reported? Yes No
9. Based on the current estate value, is the bond amount appropriate? Yes No
10. Based on the current estate value and the guardian's relationship with the IP, are the guardian reporting requirements appropriate? Yes No
11. Based on this report, should the guardian's appointment be reviewed? Yes No
12. Are there other areas of concern? Yes No
13. Are there mathematical errors in the report? Yes No
14. Enter Net Estate Value (NEV)

Saving a Draft review

Clicking 'Save' allows a user to save a partially completed review in a draft status.

The 'Add Draft Note' message displays. A comment is required. Click 'Add' to complete saving the review as a draft.

NOTE: This field is not checked by Program Coordinators; however, all users with access to the case will see the comments entered.

Clicking 'Cancel' returns the user to the work screen.

Home Inventory x

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
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. Enter Net Estate Value (NEV)

Cancel Save Next

Discard changes? x

Changes have not been saved. Click 'Yes' to close the review or 'No' to return to the screen and save changes.

No Yes

After clicking 'Add', the review closes, and the user returns to the Workbasket.

The review is now in 'New Report Draft' status.

To continue working on the review, click 'Continue'.

The review will open with the work saved.

NOTE: all users with access to the Workbasket can open a draft review and complete the 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
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11. Enter Net Estate Value (NEV)

Add Draft Note ✕

I will complete this review at my next volunteer session on Thursday, July 23rd.

Remaining: 69 characters

Draft Notes tab

The Audit section is located at the bottom of the review screen.

Click 'Draft Notes' to see the comment left when the review was saved.

Draft Notes maintains a history of each time a review was saved, displaying the:

- 1) Date and time of the save
- 2) Comment left
- 3) User who saved the review

Report Review

New Report Review

Refresh

Page 1 of 11

Filed Date	County	Name	Report type	Bond	Transaction ID	Status	
> 11/23/2016	Essex	Ruby Tuesday	EZ Accounting	\$20,000	GMP2019572	New Report Draft	Continue
> 3/8/2017	Essex	Olivia Emerson	Inventory	\$0	GMP2019659	New Report Draft	Continue
> 5/11/2017	Essex	Esx02 Esx20	Inventory	\$0	GMP2017595	New Report	Begin

New Report 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
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9. Are there other areas of concern? Yes No
10. Are there mathematical errors in the report? Yes No
11. Enter Net Estate Value (NEV)



Audit Tab

Displays the history of all actions taken on a review.

Time	Description	Performed by
07/16/2020 11:03 AM	New Report Review saved as draft.	susan.flynn
06/10/2020 06:38 PM	Data sync up update	System Generated
06/10/2020 04:35 PM	Data sync up update	System Generated
06/10/2020 11:37 AM	Data sync up update	System Generated
06/09/2020 03:46 PM	Data sync up update	System Generated
06/05/2020 03:13 PM	Data sync up update	System Generated
05/08/2020 04:06 PM	Review Status changed to New Report.	GMP
05/08/2020 04:06 PM	New Report Review Created.	GMP

Time ¹	Description ²	Performed By ³
07/16/2020 11:03 AM	New Report Draft: I will complete this review at my next volunteer session on Thursday, July 23rd.	susan.flynn



eCourts Guardianship Report Review – New Report Review

Audit Draft Notes

Time	Description	Performed by
07/16/2020 11:03 AM	New Report Review saved as draft.	susan.flynn
06/10/2020 06:38 PM	Data sync up update	System Generated
06/10/2020 04:35 PM	Data sync up update	System Generated
06/10/2020 11:37 AM	Data sync up update	System Generated
06/09/2020 03:46 PM	Data sync up update	System Generated
06/05/2020 03:13 PM	Data sync up update	System Generated
05/08/2020 04:06 PM	Review Status changed to New Report.	GMP
05/08/2020 04:06 PM	New Report Review Created.	GMP