



GUARDIANSHIP REGISTRY TOOL FOR TRIAL COURTS, STAKEHOLDERS, AND THE STATE

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COURT EMPLOYEE CONFERENCE JULY 9, 2019

OBJECTIVES:

- Recognize staffs' work within the registry to assist the courts in effectively managing guardianship cases
- Recognize the value added by registry in providing information for stakeholders
- Enhance the knowledge of and improve the use of registry reports, alerts, and best practices locally

BACKGROUND AND BENEFITS OF THE REGISTRY:

- **How the Guardianship Registry was created**
 - Indiana Adult Guardianship Task Force recommendations in 2011
 - Court Reform Grant to develop the registry in 2012
 - Workgroup met to determine the system requirements considering statutory requirements
 - System piloted in May 2014 with four counties, now have 70 counties on system
- **Benefits**
 - Aids in courts oversight of guardianships and developing best practices
 - Aids in examining statistical information
 - Aids the Adult Guardianship Office
 - Public portal to aid verifying active guardianships

E-FILING AND IMPACT ON REGISTRY

- **Trial Rule 3.1(A)**
 - Requires Guardian Information Sheet
 - Confidential document
- Each Guardianship case must list only one protected person per Administrative Rule I(B)(4)(d)

Guardianship Registry Information Sheet

Individual Estate Estate and Individual
 Check One Minor Adult Check One Temporary Permanent
 Related Cases (List any cases in which the Protected Person is a party, e.g., OHRS)

Petitioner		Relationship to Protected Person*	
Last ¹ _____	Suffix ² _____	First ³ _____	Middle _____
DOB _____	Gender ⁴ _____	Race ⁵ _____	Hispant ⁶ : Yes/No _____
Address ⁷ _____		City _____	
Home Phone _____		Work Phone _____	
Cell Phone _____		Email Address ⁸ _____	
Attorney Name _____		Bar Number _____	App. Filed Date _____
Protected Person		Estimated Value \$	
Last ¹ _____	Suffix ² _____	First ³ _____	Middle _____
DOB _____	Gender ⁴ _____	Race ⁵ _____	Hispant ⁶ : Yes/No _____
Eye Color _____	Hair Color _____	Height _____	Weight _____ lbs
Scars, Marks, and Tattoos _____			
Address ⁷ _____			
Home Phone _____		Work Phone _____	
Cell Phone _____		Email Address ⁸ _____	
Attorney Name _____		Bar Number _____	App. Filed Date _____
Language _____			
Guardian <input type="checkbox"/> Check if same as petitioner <input type="checkbox"/> Certified (Only check if Federal or State Certified)			
Last ¹ _____	Suffix ² _____	First ³ _____	Middle _____
DOB _____	Gender ⁴ _____	Race ⁵ _____	Hispant ⁶ : Yes/No _____
Address ⁷ _____		City _____	
Home Phone _____		Work Phone _____	
Cell Phone _____		Email Address ⁸ _____	
Attorney Name _____		Bar Number _____	App. Filed Date _____
Signatures/Notations			
Name ⁹ _____			
Address ¹⁰ _____			
Phone _____ Fax _____ Agent Name _____			
Close Relative (Entitled to Notice)		Relationship to Protected Person	
Last ¹ _____	Suffix ² _____	First ³ _____	Middle _____
Gender ⁴ _____	Race ⁵ _____	Hispant ⁶ : Yes/No _____	
Mailing Address ¹¹ _____			
Home Phone _____		Work Phone _____	
Cell Phone _____		Email Address _____	

E-FILING AND IMPACT ON REGISTRY

- Minor Settlement Cases
 - Under \$10,000 – MI filing
 - \$10,000 or more – GU filing
 - Special proceedings – Ratification of Transaction/Protective Proceedings under IC 29-3-4
- Errors with E-Filing – wrong case types; documents not properly marked confidential – Alert the judge

BEST PRACTICES/LEGAL REQUIREMENTS

- Oath and/or Bond Requirement, Letters of Guardianship IC 12-3-7-3
- Temporary Guardianship cases IC 29-3-3-4
 - limited to 90 days; limited to one extension of 90 days
- Juvenile Cases & Guardianship cases; Minor Guardianships
- Guardian instructions – Samples in Benchbook

GUARDIANSHIP REGISTRY



2019 REGISTRY ENHANCEMENTS

When granting a Permanent Order for a minor there are now Guardianship Type choices that are required to be entered

- IC 29-3-12-5 – Regular minor guardianship (Letter(s) will expire on minor's 18th birthday)
- IC 29-3-12-6(a) - Minor adjudicated incapacitated (Letter(s) will not expire)
- IC 29-3-12-6(b) - Minor receiving financial assistance from DCS under IC 31-9-2-17.8(1)(E) (Letter(s) will not expire)
- IC 29-3-12-7- Granted petition to extend to age 22 under IC 29-3-12-7 (Letter(s) will expire on minor's 22nd birthday)

2019 REGISTRY ENHANCEMENTS (CONT.)

- ❑ Case numbers can now be searched without the dashes or the leading zeros in the case suffix and will open to the Case Summary Screen.
- ❑ During a Case search if only one case is found it takes the user directly to the case summary screen instead of showing in search results and having user select.
- ❑ Party updates will no longer come down from Odyssey. All party changes must take place in the Guardianship Registry.

2019 REGISTRY ENHANCEMENTS (CONT.)

- ❑ All Orders Granting Guardianship (Temp, Extended and Perm) must be done in the Guardianship Registry. Adding the event in Odyssey will no longer add the Order into the Guardianship Registry.
- ❑ Once a Permanent Guardianship has been granted the Grant Permanent Guardianship task will disappear. It will only reappear when a different (new or Successor) guardian is added to the case in the registry
- ❑ When an Order Granting Guardianship is digitally signed in the Guardianship Registry there is now an option to send copy of the order to attach to event in Odyssey.

2019 REGISTRY ENHANCEMENTS (CONT.)

- All Letters of Guardianship must be entered in the Guardianship Registry. You can't add the LG the event in Odyssey, Use an ADM event and add a comment to show that a Letter was issued if you don't use the Registry.
- Letters cannot be issued until the Oath Filed date is entered.
- Letters now appear on the Guardians instead of the Incapacitated Adult/Minor.
- Expiration Date for Temp Letters will be 90 days from the Order date not the date the letter was issued.

2019 REGISTRY ENHANCEMENTS (CONT.)

- When Accounting and Status are overdue letters will appear under Printed Forms for Judges to send to Guardians.
- On Case Summary Screen an Order History Information Bubble will appear next to the order date.
- Case Notes can now be deleted by the creator.
- Oath Filed has now been changed to a Date field

PLEASE REMEMBER

- ❑ Temporary guardianship are only valid for 90 days. Effective 7/1/18 on extension is allowed and **must** be executed prior to the expiration of the initial guardianship.
- ❑ Once the Letter Date is entered in the registry the case is accessible on <https://public.courts.in.gov>

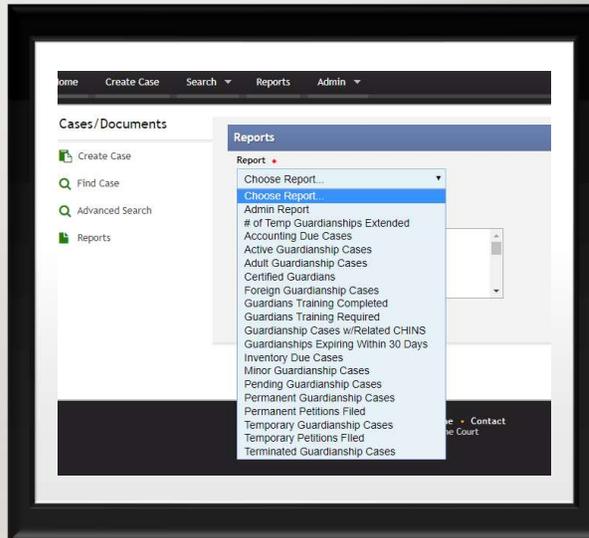
ALERTS

- Minor Guardianship case(s) that will expire within 90 days
- CHINS cases that do not have a Guardian Ad Litem
- Case(s) that will expire in 90 days
- Bond Required Cases
- Accounting Due Cases
- Order Date without Letter Date
- Inventory Due Cases
- e-Filed Cases
- Venued IN Cases / Venued OUT Cases

ANNUAL REVIEW

Total Number of Orders	52	
Issues	Number of Issues	Explanation of Issue
Order Date No Letter Date	4	Order of Guardianship has been issued but no letters appear in the Registry.
Accounting Due	47	The Accounting Due Date set in the Registry is beyond the current date.
Inventory Due	0	The Inventory Due Date set in Registry is beyond the current date.
Party Info	7	Required information is missing on one or more parties and their names appear in red in the Registry.
Total # of Issues	58	
Avg. # of Issues Per Order	1.12	

REGISTRY REPORTS



HOW TO IMPORT AN E-FILED CASE INTO THE REGISTRY?

[You have 14 case\(s\) requiring the assignment of a Guardian Ad Litem.](#)

[You have Accounting due on 1 case\(s\).](#)

[You have 51 case\(s\) that have a Order date without a Letter date.](#)

[You have Status due on 5 case\(s\).](#)

[You have 246 E-Filed cases.](#)

SELECT THE CASE TO BE IMPORTED

E-Filed Cases		
Case Number	Style	Status
29D01-1604-GU-00069	In Re: the Guardianship of Ty S.	EFile
29D03-1605-GU-00081	In Re: the Guardianship of Louise W	EFile
29D01-1605-GU-00087	In Re: the Guardianship of Damian	EFile
29D01-1606-GU-00093	In Re: the Guardianship of Madeline	EFile
29D01-1606-GU-00100	In Re: the Guardianship of Emily	EFile

ENTER REQUIRED INFORMATION

Create Efile Case ✕

29D03-1710-GU-000197

Protected Person

Yeily Ann Rivera Colon
Adult/Minor Type Adult Minor
DOB Gender
Race

Guardian same as Petitioner? Yes No

Petitioner & Guardian

Yesenia Colon Sepulveda
Relationship to Protected Person
Certified Guardian Yes No
Guardian of Individual Estate Both
Gender Race

SET CASE REQUIREMENTS

Case Requirements Set All No

Bond Required <input checked="" type="checkbox"/>	Bond Amount <input type="text"/>	Bond Filed <input checked="" type="checkbox"/>	Inventory Filed <input checked="" type="checkbox"/>
<input type="radio"/> Yes <input checked="" type="radio"/> No		<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> Waived
Accounting Filed <input checked="" type="checkbox"/>	Next Accounting Due Date <input type="text"/>	Accounts Verified <input checked="" type="checkbox"/>	Oath Filed <input checked="" type="checkbox"/>
<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> Waived		<input type="radio"/> Yes <input checked="" type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No
Status Filed <input checked="" type="checkbox"/>	Next Status Due Date <input type="text"/>	Guardianship Instructions Filed <input checked="" type="checkbox"/>	
<input type="radio"/> Yes <input checked="" type="radio"/> No		<input type="radio"/> Yes <input checked="" type="radio"/> No	
Guardianship Training Required <input checked="" type="checkbox"/>	Guardianship Training Completed Date <input type="text"/>		
<input type="radio"/> Yes <input checked="" type="radio"/> No			

e-file Pending Case Number: 29D03-1710-GU-000204

Case Summary

Case Details

<u>Case Information</u> 29D03-1710-GU-000204	<u>Case Filed Date</u> 10/19/2017	<u>Deny/Dismiss Date</u>	
<u>Hearing Date/Time</u>	<u>Judicial Officer</u> WILLIAM HUGHES, Judge	<u>Bond Required</u> No	<u>Bond Filed</u> No
<u>Oath Filed</u> No	<u>Training Required</u> No	<u>Instructions Filed</u> No	
<u>Inventory Filed</u> No	<u>Next Accounting Due Date</u>	<u>Accounting Filed</u> No	<u>Accounts Verified</u> No
<u>Next Status Due Date</u>	<u>Status Filed</u> No	<u>Related Cases</u>	

Petitioner Individual

Name	Date Of Birth	Attorney	Address
Iam Petitioner			

Protected Person

Name	Date Of Birth	Guardianship Type	Letter Date	Expiration Date
Iam Protected				

Event History 

Case History 

VIEW
CASE
SUMMARY

HOW TO IMPORT A PREEXISTING CASE INTO THE REGISTRY”

- Use the MEGUR Event
 - To add an existing case from Odyssey to the Registry that isn't in your e-filed Cases list in the Alert section.
- Required Data
 - Guardianship Subtype
 - Party Connection – Incapacitated Adult/Child
 - Party Information – Full Name, DOB, Race, Gender and Address
 - Order Date, Letter Date, Temporary/Permanent and CHINS.

USE THE “?”
PICKER ON
THE MEGUR
EVENT



ADD
REQUIRED
DATA IN
PROMPTS



INCITE SELF-HELP RESOURCES



Need Help?

HELPDESK@COURTS.IN.GOV

OR

1-888-275-5822



