

# Indiana's Guardianship Registry

## USER MANUAL

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## Application Overview

The Guardianship Registry application will populate Indiana’s statewide database of guardianships issued for adults and minors. The Guardianship Registry interfaces with Odyssey CMS and the Guardianship Public Search site. The interface allows case data entered in the Registry to electronically create and update the Odyssey case. Additionally, some Odyssey data electronically updates the Registry. The public search site allows interested parties to view the non-confidential public information regarding the guardianship.

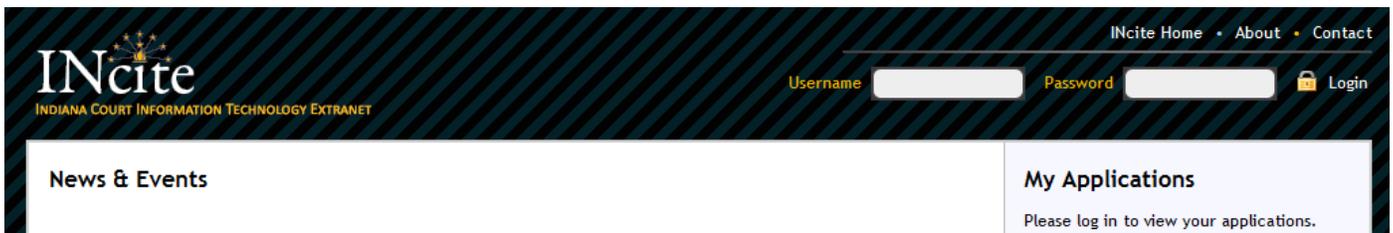
With the automated interfaces, we expect a measurable reduction in the workload for court and clerk personnel.

The Guardianship Registry application is accessed through the Indiana Court Information Technology Extranet (INcite) portal. User IDs and passwords are provided by COURT TECHNOLOGY.

*\*This user’s guide is intended to assist the general user while learning the Guardianship application. It is not intended to answer local business process related or county specific questions.*

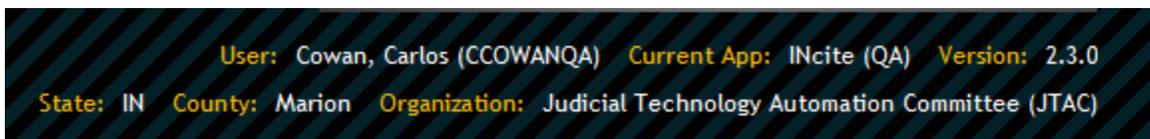
## Application Login

1. Navigate to <https://MyCourts.IN.gov>
2. Add to your Internet Explorer Favorites: Click the **Favorites** menu and select **Add to Favorites**.
3. Enter Username and Password then click **Login**.



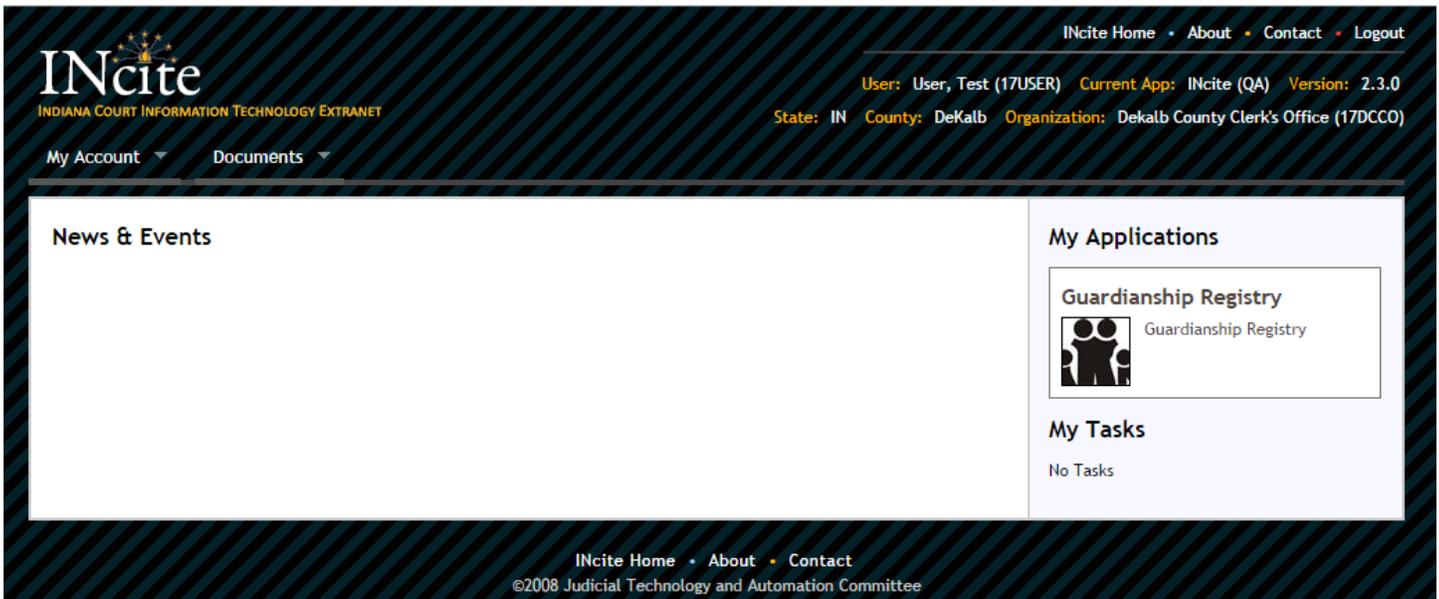
## Session Defaults

This shows you the County and the Court or Office you are assigned to.



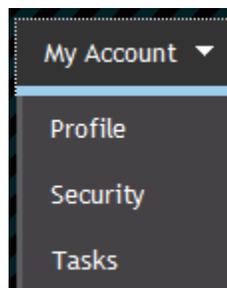
## Application Icon

The next screen shows you a list of the applications that you have access to. This screen also will allow you to view and/or download User's Guides, Quick Guides, and other documentation for the applications. Click on the title of the application to access it.



## My Account

By selecting the My Account link on the left side of the screen, under the INcite logo, you can update your profile and change your password. When you move your mouse over the My Account link, a menu will appear.



## Profile

This screen allows you to update your personal information.

The screenshot shows the 'USER PROFILE' page with a navigation bar at the top containing 'My Account', 'Administration', and 'Documents'. The main content area is titled 'USER PROFILE' and is divided into two sections: 'Personal Information' and 'E-mail Options'. The 'Personal Information' section contains input fields for Street, City, State (a dropdown menu currently showing 'Alaska'), ZIP, Job/Position Title, Phone Number (with a pre-filled value '(317) 234-5994'), Ext, and FAX Number. The 'E-mail Options' section features three radio button options: 'I have a unique e-mail address', 'I have an e-mail address that I share with a co-worker' (which is selected), and 'I do not have an e-mail address'. Below the second option are input fields for 'E-mail' and 'Confirm E-mail', both containing the address 'ccowan@jtac.in.gov'. At the bottom of the form are 'Save Profile' and 'Cancel' buttons.

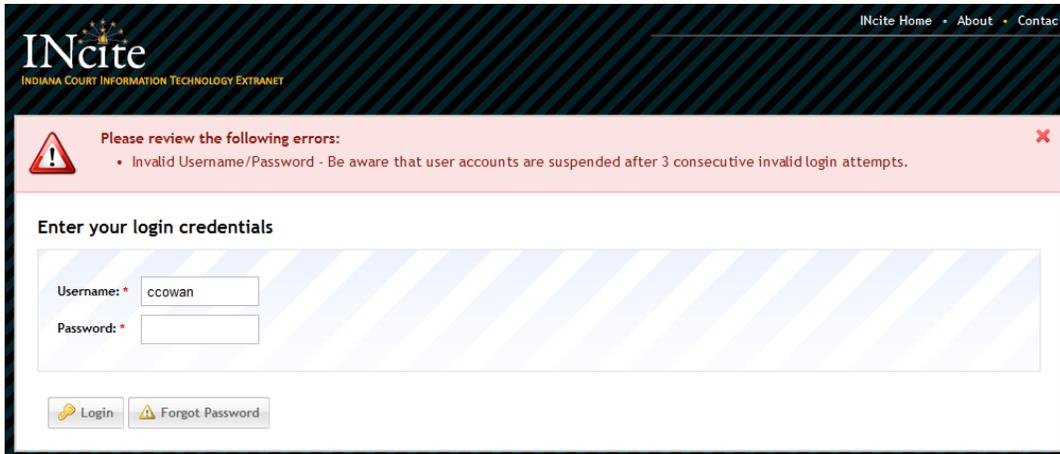
## Security

This screen allows you to select or change your security question and answer to retrieve your password in the event that you have forgotten it. You will only be able to retrieve your password if you have a unique email address entered in your Account Profile. You may change your password on this screen.

The screenshot shows the 'USER SECURITY PROFILE' page with a navigation bar at the top containing 'My Account', 'Administration', and 'Documents'. The main content area is titled 'USER SECURITY PROFILE' and is divided into two sections: 'Password Recovery' and 'Change Password (Optional)'. The 'Password Recovery' section contains a dropdown menu for 'Reset Question' (currently showing 'What was your high school mascot?') and an input field for 'Reset Answer' (containing 'lancer'). The 'Change Password (Optional)' section contains three input fields for 'Current Password', 'New Password', and 'Confirm New Password'. At the bottom of the form are 'Save' and 'Cancel' buttons.

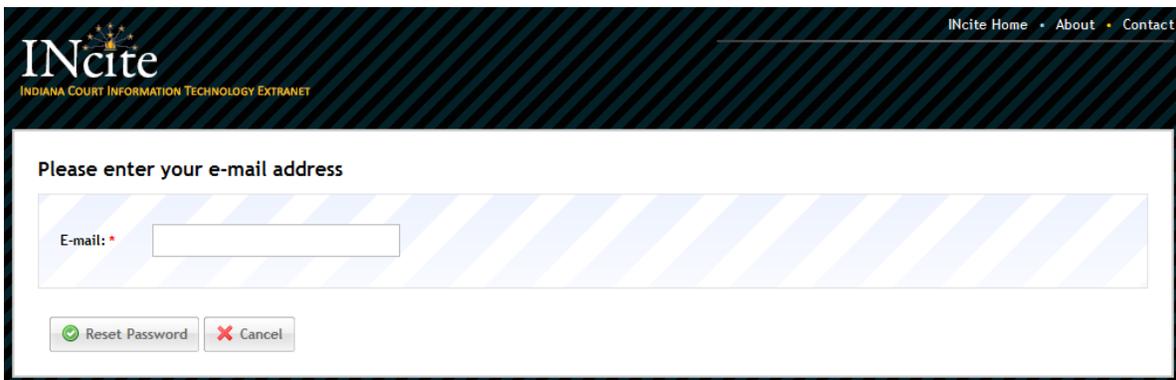
## Reset Forgotten Password

If you are unable to login, the following screen will appear.



The screenshot shows the INCite login page. At the top left is the INCite logo with the tagline "INDIANA COURT INFORMATION TECHNOLOGY EXTRANET". At the top right are links for "INCite Home", "About", and "Contact". A red error banner at the top contains a warning icon and the text: "Please review the following errors: Invalid Username/Password - Be aware that user accounts are suspended after 3 consecutive invalid login attempts." Below the banner is a section titled "Enter your login credentials" with a light blue striped background. It contains two input fields: "Username: \*" with the value "ccowan" and "Password: \*". At the bottom of this section are two buttons: "Login" and "Forgot Password".

If you can't remember your password, select the **Forgot Password** button at the bottom of the screen.



The screenshot shows the INCite forgot password page. At the top left is the INCite logo with the tagline "INDIANA COURT INFORMATION TECHNOLOGY EXTRANET". At the top right are links for "INCite Home", "About", and "Contact". The main heading is "Please enter your e-mail address". Below this is a light blue striped background with an "E-mail: \*" input field. At the bottom are two buttons: "Reset Password" (with a green checkmark icon) and "Cancel" (with a red X icon).

Enter your email address in the box and select **Reset Password**. A new password will be sent to you via email and you will be required to change it upon login. This will only work if the email address matches the email address stored in your profile and the email address is unique within INCite (i.e. not a shared email address). If these conditions are not met, you will be required to call the COURT TECHNOLOGY Help Desk to have your password reset. The COURT TECHNOLOGY Help Desk can be reached by calling 1-888-275-5822 or by email at [helpdesk@courts.in.gov](mailto:helpdesk@courts.in.gov).

# Home

The home screen is the first screen you will see after clicking on the Guardianship Registry icon from the INCite Application list. At the top of the home screen there are four menu headers. *Home*, will take you to the registry's home page from anywhere within the registry. *Case/Document Creation* will allow you to go directly into case creation. *Search*, has two dropdown options: Find Case and Advanced Search. *Reports*, will allow you to generate canned reports.

The home screen is divided into two sections below the menu headers: the left navigational pane and the working pane. The left navigational pane is divided into two sections: Cases/Documents and Quick Links. The working pane is also divided into two sections: Alerts and Recent Cases.

Guardianship Registry Home • About • Contact • Logout

User: Epperson, Lajuan (LEPPERSONQA) Current App: Guardianship Registry (QA) Version: 2.3.0  
State: IN County: Adams Organization: Adams Circuit Court (01C01)

Home Case/Document Creation Search Reports

**Cases/Documents**

- Create A Case
- Find Case
- Advanced Search
- Reports

**Quick Links**

- Hearings Today
- Recent Cases

Welcome to the INCite Guardianship Registry

**Alerts**

[You have 6 case\(s\) requiring the assignment of a Guardian Ad Litem.](#)

**Recent Cases**

Case Number	Protected Person	Guardianship Type
01C01-1404-GU-000TBD		Temporary Adult
17C01-1404-GU-000051	James Williams, James Smith	Permanent Adult
17C01-1404-GU-000050	First Middle Smith	Temporary Minor
17C01-1404-GU-000049	Michael Earl James	Temporary Adult
17C01-1404-GU-000048	Tyler Williams	Permanent Adult
17C01-1404-GU-000047	Doug F. Jones	Temporary Minor
49C01-1404-GU-000TBD	Mary Jane Brown	Temporary Adult
49C01-1402-GU-000003	Linda Jackson, James Williams	Temporary Minor
01C01-1403-GU-000989	Michael Miller, Mike N James	Temporary Minor
01C01-1403-GU-000989	Thomas Henry	Temporary Minor

Guardianship Registry Home • About • Contact  
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## Alerts

The Alerts section provides you with a link to the cases that require immediate attention. There are nine alert options: CHINS cases that are about to expire; 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; and Venued IN/OUT Cases. You can filter your alerts by your county's courts.

The screenshot shows the INcite Guardianship Registry interface. The top navigation bar includes links for Home, Create Case, Search, Reports, and Admin. The user is identified as Cook, Nadisha (NWCOOK) in the State of IN, County of State Agency, and Organization of Court Technology (CT). The Alerts section is active, showing a welcome message and three alert messages: "You have 1 case(s) expiring in the next 90 days.", "You have 1 expiring case(s) are CHINS cases.", and "You have 1 venued in case(s)".

## Recent Cases

This feature shows you the last 10 cases the user has accessed. The Recent Cases List is always available on the homepage. You can also access this list from the left navigational pane. To access a case from this list click on the case when it is highlighted in red.

The screenshot shows the INcite Guardianship Registry interface. The top navigation bar includes links for Home, Create A Case, Search, and Reports. The user is identified as Epperson, Lajuan (LEPPERSONQA) in the State of IN, County of Adams, and Organization of Adams Circuit Court (01C01). The Recent Cases section is active, showing a welcome message and a table of recent cases. The table has three columns: Case Number, Protected Person, and Guardianship Type.

Case Number	Protected Person	Guardianship Type
01C01-1404-GU-000456	Allen Jacsion	Temporary Minor
17C01-1404-GU-000053	Ball Mason	Permanent Adult
01C01-1404-GU-000122	Sally Jones	Permanent Adult
01C01-1404-GU-000012	Amanda James, Tammy James	Permanent Adult

## Cases/Documents

### Create Case

To create a case, you must complete each of the case creation screens displayed on the left navigational pane. The case creation screens are Case Information, Petitioner, Protected Person, Guardian, Interested Party, and Case Details. The Case Summary Screen provides a quick view of the entire case data.

### Case Information

On the Case Information Screen, your court will be defaulted for you. If you have the ability to create cases for multiple courts, select the court from the drop down menu. The year and date will be prepopulated, however you may change the date(s) if necessary. **(For Odyssey Counties, your date field will be locked down and cannot change).** The Case Type will be automatically entered as GU. Enter the Filing Sequence if you are a non-Odyssey county. Odyssey counties filing sequence will show as 'TBD'. Select the Foreign box if you are adding a guardianship that was issued from a state other than Indiana. Add Related Cases, if applicable. Select the Next button. **Note: All Red Asterisks (\*) are required fields, and will turn to green checkmarks once answered.**

**INcrite**  
INDIANA COURT INFORMATION TECHNOLOGY EXTRANET

User: Cook, Nadisha (NWCOOK) Current App: Guardianship Registry (QA) Version: 2.3.0  
State: IN County: State Agency Organization: Court Technology (CT)

Home Create Case Search Reports Admin

**Case Information** Case Number: 01D01-1602-GU-000123

- Case Information
- Petitioner
- Protected Person
- Guardian
- Interested Party
- Case Details
- Case Summary

**Court**   
Adams Superior Court  Legacy Case Number

**Year**  **Month**   
2016 02

**Case Type**  
GU

**Filing Sequence**   Foreign  
000123

**Related Cases**

### Party Search

The Guardianship Registry has a party directory. Every party on a case is maintained in the directory to help minimize duplicate data entry. To add a party to the case you must search the directory first. You are encouraged to start your search with first and last name only. If you need to narrow your search results, add additional search criteria to find the party you need. If your party is not in the directory, you must add a new party record.

## Petitioner

On the Petitioner Party Search screen, enter the last, and or first name of the petitioner. You may add the race and gender to help narrow your search results, then select the 'Search' button. If the petitioner is listed in the search results hover over it and click the highlighted party. The party record will populate so that you can review and edit as needed.

Guardianship Registry Home • About • Contact • Logout  
 User: Epperson, Lajuan (LEPPERSONQA) Current App: Guardianship Registry (Dev) Version: 2.3.0  
 State: IN County: State Agency Organization: Judicial Technology Automation Committee (JTAC)

Home Create Case Search Reports Admin

Case Information  
**Petitioner** Case Number: 01C01-1409-GU-000100  
 Protected Person  
 Guardian  
 Interested Party  
 Case Details  
 Case Summary

Samba
  Brenda

No records found!

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If the Petitioner is not found, select the 'Add New' button to add the petitioner's party information. On the Petitioner screen, enter the required fields, notated by the red asterisk, and any additional fields where data is available.

Once you have entered all of the information you have on the petitioner, click on the 'Add as Petitioner' button at the bottom of the screen. If the Petitioner is also the 'Guardian' click on the 'Add as Petitioner and Guardian' button. A dialog box will appear where you are required to answer questions. Select 'Save' and you will be taken back to the search screen again.

If there are multiple petitioners on this case, search for that party using the steps described above to add them to the case. Select the 'Next' button at the bottom of the screen to move to the Protected Person party search screen.

Guardianship Registry Home • About • Contact • Logout


User: Epperson, Lajuan (LEPPERSONQA) Current App: Guardianship Registry (Dev) Version: 2.3.0  
State: IN County: State Agency Organization: Judicial Technology Automation Committee (JTAC)

Home Create Case Search Reports Admin

---

- Case Information
- Petitioner**
- Protected Person
- Guardian
- Interested Party
- Case Details
- Case Summary

Case Number: 01C01-1409-GU-000100

### Petitioner

Petitioner List				
Last Name	First Name	Middle	DOB	SSN
Samba	Brenda			
Samba	Jason			

+ Add

◀ Previous
Next ▶

Guardianship Registry Home • About • Contact  
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**Protected Person**

On the Protected Party Search screen, enter the last, and or first name of the protected person. You may add the race and gender to help narrow your search results then select the ‘Search’ button. If the protected person is listed in the search results choose the highlighted party by clicking. The party record will populate so that you can review and edit as needed.

If the Protected Person is not found, select the ‘Add New’ button to add the protected party information. On the Protected Person screen you will enter the required fields notated by the red asterisk, and any additional fields where data is available. ***The Protected Person party record includes two additional sections; Guardians Type and Personal Identifier section with an Estimated Value field.***

- Case Information
- Petitioner
- Protected Person
- Guardian
- Interested Party
- Case Details
- Case Summary

## Protected Person Case Number: 17C01-1602-GU-000027

Last Name

Suffix

First Name

Middle Name

DOB

Gender

Race

Ethnicity

SSN

Home Number

Work Number

Cell Number

Fax Number

Email Address

**Addresses (required)**

Address Type	Address	City	State
Mail (Not Confidential)	222 So Do I Road	EDINBURGH	IN

+ Add Address

**Personal Identifiers**

Eye Color

Hair Color

Skin Tone

Height  ft.  in.

Weight  lbs

Scars, Marks and Tattoos

Estimated Value of Protected Person's Property

**Guardian Type**

Guardianship Type  Adult/Minor Type

Temporary

Adult

Permanent

Minor

Protected Person Currently is CHINS

**Attorney/Guardian Ad Litem**

Pro Se

Attorney ID

Name

\* Retained

Lead Attorney

GAL

CASA

Waived by Court

Last Name

First Name

Save

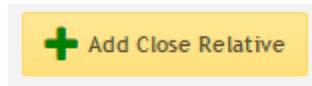
Cancel



Once you have entered all of the information you have on the protected person, click on the 'Add as Protected Person' button at the bottom of the screen. You will be taken to the search screen again.

### Close Relative

To add the Close Relative of the Protected Person, you will select the 'Add Close Relative' button at the bottom of the Protected Person/Close Relative screen to conduct a search for your party. Enter the relationship and click on the...

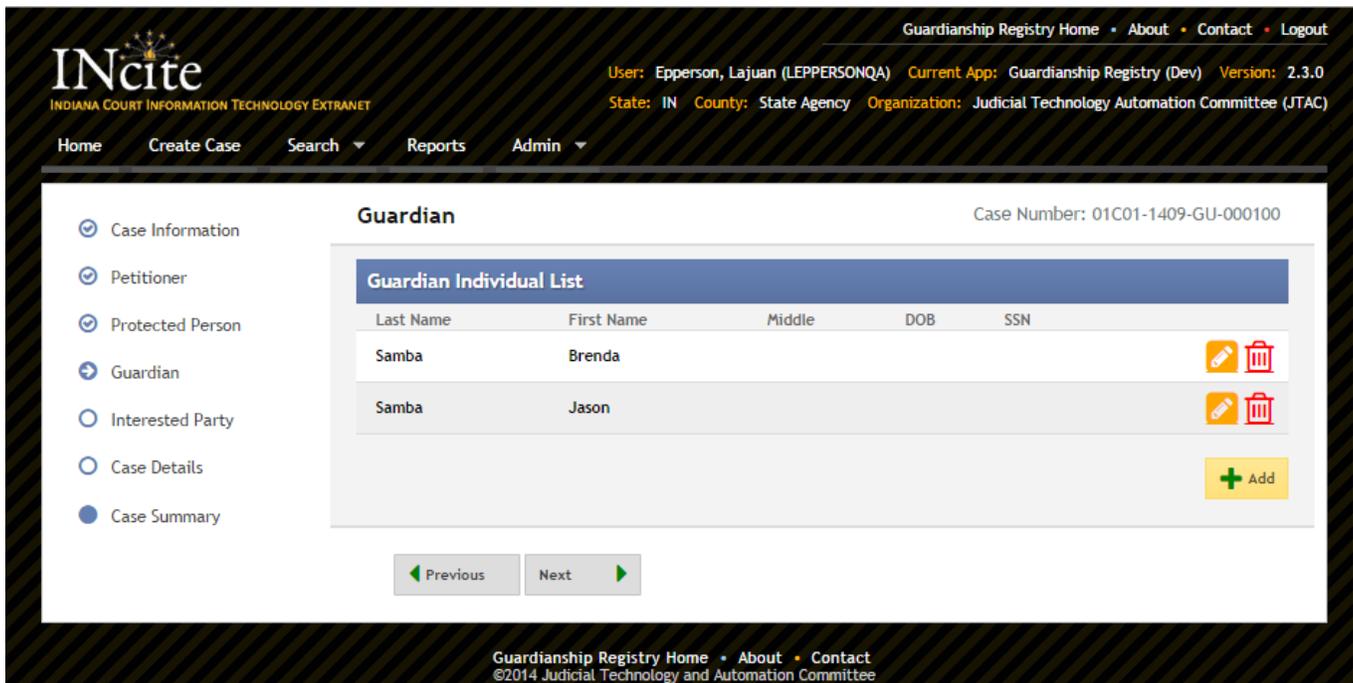


When you find your party or add the new party, select the 'Add as Close Relative' button.



### Guardian

If the Petitioner and the Guardian are the same person and the 'Add as Petitioner and Guardians' button was selected, the Guardians party record will be populated. Click 'Next' to move on to enter the Interested Party Record.



If the Guardian record is not populated on the Guardian screen, the Guardian Search screen will appear so that you can enter the last, and or first name of the guardian. You may add the race and gender to help narrow your search results,

then select the 'Search' button. If the guardian is listed in the search results, hover over it and click the highlighted party. The party record will populate so that you can review and edit as needed.

If the Guardian is not found, select the 'Add New' button to add the guardian's party information. On the Guardian screen, enter the required fields, notated by the red asterisk, and any additional fields where data is available. Once you have entered all of the information you have on the guardian click on the 'Add as Guardian' button at the bottom of the screen. If there are multiple guardians on this case, search for that party using the steps previously described and add them to the case. Select the next button at the bottom of the screen to move to the Interested Party search screen.

## Interested Party

On the Interested Party Search screen, enter the last, and or first name of the interested party, or the institution name. You may add the race and gender to help narrow your search results then select the 'Search' button. If the interested party is listed in the search results, choose the highlighted party by clicking. The party record will populate so that you can review and edit as needed. Interested Party can also be set as a Bond Agent.

If the Interested Party is not found, select the 'Add New' button to add the interested party information. On the Interested Party screen, you will enter the required fields, notated by the red asterisk, and any additional fields where data is available. Once you have entered all of the information you have on the interested person, click on the 'Add as Interested Party' button at the bottom of the screen. You will be taken to the search screen again. If there are more than one Interested Party on this case search for that party using the steps previously described and add them to the case. Select the next button at the bottom of the screen to move to the Case Detail screen.

The screenshot displays the 'Interested Party' form within the INcite application. The top navigation bar includes 'Guardianship Registry Home', 'About', 'Contact', and 'Logout'. The user is identified as 'Cowan, Carlos (CCOWAN)' using the 'Guardianship Registry (QA)' app, version 2.3.0, in the state of IN, county of State Agency, and organization of Court Technology (CT). The main navigation menu contains 'Home', 'Create Case', 'Search', 'Reports', and 'Admin'. On the left, a sidebar lists navigation options: Case Information, Petitioner, Protected Person, Guardian, Interested Party (selected), Case Details, and Case Summary. The form itself is titled 'Interested Party' and shows 'Case Number: 17C01-1602-GU-000027'. It contains several sections: a top row for 'Last Name' (Jones), 'Suffix', 'First Name' (Sally), 'Middle Name', and 'DOB'; a row for 'Gender', 'Race', 'Ethnicity' (Non-Hispanic), and 'SSN'; a row for 'Home Number', 'Work Number', 'Cell Number', and 'Fax Number'; an 'Email Address' field; an 'Addresses (required)' section with 'Address Type' (Mail (Not Confidential)), a checkbox for 'Home Address is same as Mailing Address', and fields for 'Address Line 1', 'Address Line 2', 'Zip Code', 'City', and 'State'; an 'Attorney' section with a 'Pro Se' checkbox, 'Attorney ID', 'Name', and 'Lead Attorney' checkbox; and a 'Search' button. At the bottom, there are 'Add as Interested Party' and 'Cancel' buttons.

## Case Detail

On the Case Details Screen, the Case Filed Date will prepopulate to today's date but can be changed if the case was filed prior to the date of entry. You may enter the Hearing Date/Time and Order Date, when applicable. Enter the Judicial Officer ID. If unknown, click the 'Search' button to search by name. When the Order Date is populated, the Guardianship Type header will be added to the Case Detail screen so that the Letter Filed date can be entered. If it is a Temporary Letter, the expiration date will prepopulate to 90 days from the issue date.

Under the Case Requirements header, when initiating the case, you may click the **Set All No** button located in the top right, if applicable; or choose the appropriate **Yes** or **No** radio button for each required field. Note: when a radio button is changed the associated case event is sent to Odyssey. (See Odyssey Interface Section)

As the case evolves, you must change the statue of the case requirements. **Please ensure this section reflects the current status of the case at all times as the case status and the accounting and inventory alerts are driven off of this information.** The registry will auto calculate the **Inventory Due** dates when the radio button is set to **No**. When the inventory is filed, set it to **Yes**. The **Accounting Due** alert is driven off of the Accounting Due date when Accounting Filed is set to **No**. You must populate the due date for the accounting and reset it as it changes.

When Accounting Filed is marked "Yes" and saved, two years will automatically be added to the Accounting Due Date. **(This Date can be edited).**

When a Permanent Order Date is added, and the Accounting Due Date is blank, the Accounting Due Date will automatically be set to 2 years from the Order Date. **(This date can be edited).**

If a *Bond is required*, click **Yes** and enter the bond amount. When the bond is posted set the **Yes** radio button for *Bond Filed*. Set the radio buttons for *Oath Filed*, *Guardianship Instructions Filed*, and *Guardianship Training* as appropriate. When you have entered all required data select the appropriate 'Save' or 'Submit' button and you will be taken to the Case Summary Screen.

**\* Odyssey counties will see this message while the case is being transmitted to Odyssey for the case creation.**



## Case Summary Screen

On the Case Summary Screen, you can review the entire case. The case status will appear at the top of the screen and will change based on the actions taken during the life of the case. At creation the status will be “Pending”, when the Order Date is populated the status will change to “Active” and when the case is dismissed or terminated the status will change accordingly. After this is done, it will be grayed out and you cannot change it. The top of the Case Summary Screen will display all Case Alerts for that specific case.

You may click on each header in the working pane to review and/or edit that section. *If you make a change to any of the data in these sections you have **modified** the case in the Registry and possibly in Odyssey if your court uses Odyssey as its case management system, so please be mindful of your actions.*

In the left navigational pane, you can complete any of the tasks under **I want to...** or Print Forms for the specific type of guardianship case.

**I want to .....**

- Add Attachment
- Add Case Note
- Add Case Task
- Copy Case
- Grant Permanent Guardianship
- Grant Temporary Guardianship
- Revoke Letter
- Terminate Guardianship
- Venue Out

**Print Forms**

- Order for Report of Physician
- Order Appointing Guardian for Minor
- Letter of Guardianship
- Certified Letter of Guardianship

**Admin**

- Delete Case

**Case Summary** Active Case Number: 16D01-1603-GU-000852

**Case Details**

Case Information	Case Filed Date	Order Date	
<a href="#">16D01-1603-GU-000852</a>	03/30/2016	03/22/2016	
Hearing Date/Time	Judicial Officer	Bond Required	Bond Filed
		No	No
Oath Filed	Training Required	Instructions Filed	
No	No	Yes	
Inventory Filed	Accounting Due Date	Accounting Filed	Accounts Verified
No	03/22/2018	No	No
Status Due Date	Status Filed		
	No		

**Petitioner Individual**

Name	Date Of Birth	Attorney	Address
Erol Johnson	12/2/1940		(W) 1500 Main St. INDIANAPOLIS, IN 46204

**Protected Person**

Name	Date Of Birth	Guardianship Type	Letter Date	Expiration Date
Manny Walker	5/15/2000	Permanent Minor	3/30/2016	

**Guardian Individual**

Name	Certified Guardian	Guardian Of	Address
Erol Johnson	No	Both	(W) 1500 Main St. INDIANAPOLIS, IN 46204

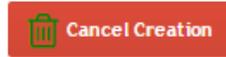
**Case History** +

I want to.....

From the Case Summary screen, you can complete several tasks for that case type using the ‘**I want to.....**’ function. Your task options will vary based on the status of the case.

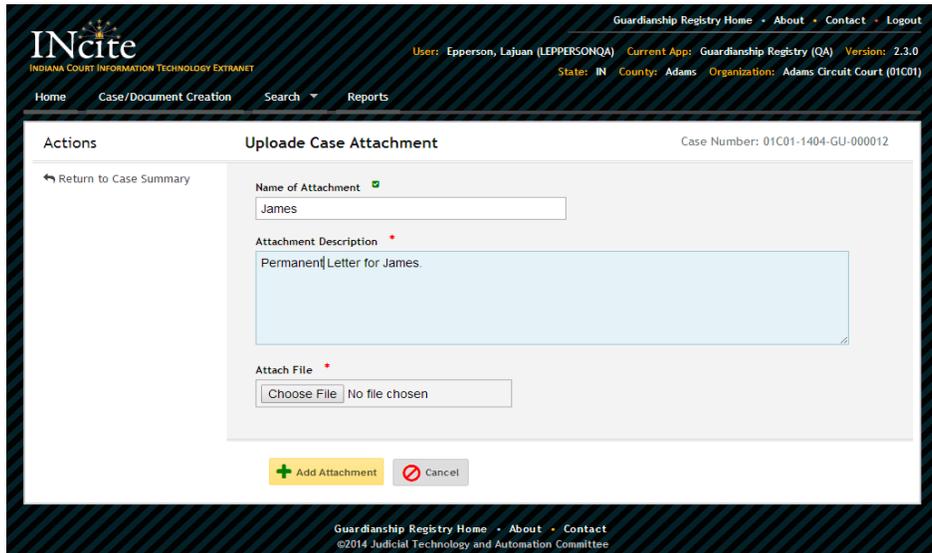
Please note that there isn’t a **Submit** or **Modify Case** task. In Odyssey counties, the case is electronically transmitted to Odyssey for the case creation when ‘**Submit**’ is selected on the Case Details screen and in all other counties the case is saved when you select ‘Save.’ Guardianship case are not transmitted to the state or federal databases at this time. Whenever you make a change in the registry the case is technically **modified** once the changes are saved and those changes will be electronically updated in Odyssey when applicable.

You may cancel the creation of a Guardianship case, before submitting it by clicking on the Cancel Creation button on the party's screen.



### Add Attachment

To add an attachment, select the 'Add Attachment' option from the left navigational pane. Enter the name of the attachment, the description, and select the browse button to choose the attachment. Select the 'Add Attachment' button.

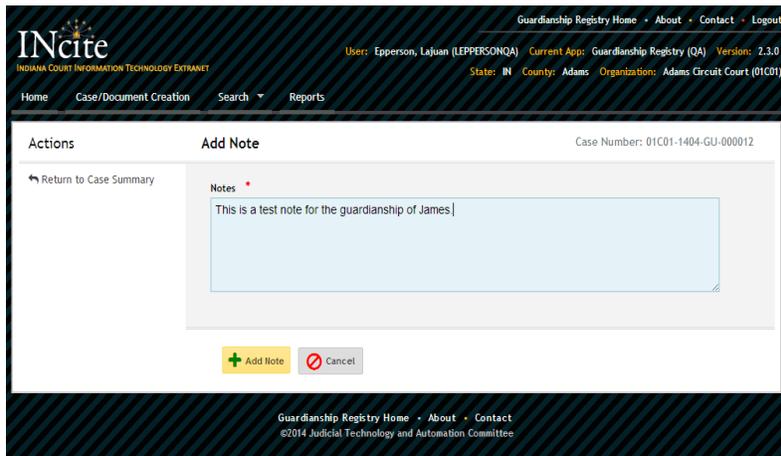


Once you return to the Case Summary Screen, you will see the added attachment under the Attachment header.



### Add Case Notes

To add a Case Note, select the 'Add Note' option from the left navigational pane. Enter the notes in the box provided, and select the 'Add Note' button.

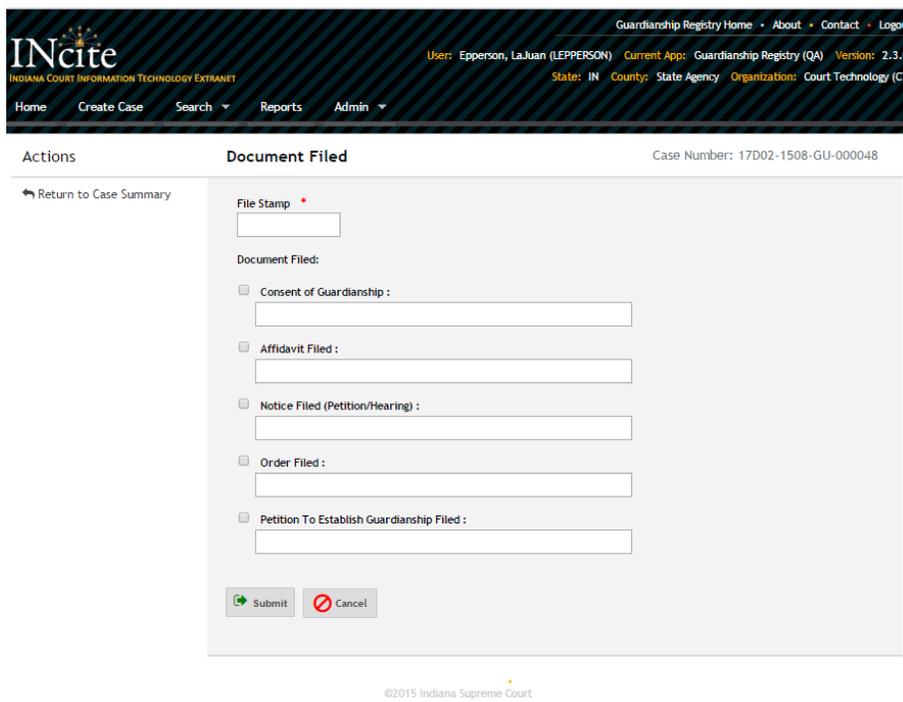


Once you return to the Case Summary Screen, you will see the added note under the Notes header.

Notes	
Created On	Note
4/14/2014 8:44:48 AM	This is a test note for the guardianship of James.

#### Add Document Filed

To add the Document Filed case event to the case in Odyssey, select the Add Document Filed option from the left navigational pane. Enter the File Stamped date and check the documents in the Document Filed check box and click 'Submit.'



## Grant Permanent Guardianship

This task should be used to change the guardianship type from temporary to permanent and will only appear on temporary guardianship cases. To grant the Permanent Guardianship, select the order signed date from the calendar drop down. Enter the Judicial officer ID or select from the search option and choose the judicial role. Enter any applicable comments in the comment box and select 'Submit'. The permanent order date will appear on the Case Summary screen and the temporary letter date will be removed.

The screenshot shows the 'Grant Permanent Guardianship' form. At the top, it says 'Actions' and 'Grant Permanent Guardianship' with the case number '16D01-1603-GU-000852'. There is a 'Return to Case Summary' link. The form includes an 'Order Signed' date field. Below that is a 'Judicial Officer' section with 'Signed By' information, including 'Judicial Officer ID', 'Judicial Officer' (with a search button), and 'Judicial Role' (with a dropdown menu). There is a 'Signature Date' field with a calendar icon and an 'Attach Digital Signature' checkbox. A black arrow points to this checkbox. Below the signature date is a 'Comment' text area. At the bottom are 'Submit' and 'Cancel' buttons.

You can attach a Digital Signature of the Judicial Officer.

## Revoke Letter

The Revoke Letter task will only be available on cases that have a Letter Issued date. To show that the Letter of Guardianship was revoked, select Revoke Letter option from the left navigational pane. Enter the date the letter was revoked, select the guardian whose letter was revoked and enter the reason for the revoke, and then select 'Submit.'

***Odyssey Counties:*** When a Letter of Guardianship is revoked, the guardian is removed from Odyssey.

***The case status will change from Active to Revoked if there was only one Guardian on the case.***

The screenshot shows the 'Revoke Guardianship Letter' form. At the top, it says 'Actions' and 'Revoke Guardianship Letter' with the case number '17C01-1405-GU-000025'. There is a 'Return to Case Summary' link. The form includes a 'Letter Revoke Date' field. Below that is a 'Letter Revoke for Guardian' section with a 'Good Will' checkbox. Below that is a 'Revoke Reason' text area. At the bottom are 'Submit' and 'Cancel' buttons. The page header includes 'INcITE INDIANA COURT INFORMATION TECHNOLOGY EXTRANET' and user information: 'User: User, Test (17USER) Current App: Guardianship Registry (Dev) Version: 2.3.0 State: IN County: DeKalb Organization: DeKalb County Clerk's Office (17DCCO)'. The footer includes 'Guardianship Registry Home - About - Contact ©2014 Judicial Technology and Automation Committee'.

## Copy Case

The Copy Case feature can be used when two separate cases are filed for family members where the same parties will appear on both cases.

To copy a case, select the 'Copy Case' option from the left navigational pane. Check the box from the option provided, and select the Copy Case button. You will be directed to the Copy Case party selection screen. Identify the parties that you want to copy into the new case and click on 'Copy Case'.



The screenshot shows the INcite web application interface. At the top, there is a navigation bar with the INcite logo and the text "INDIANA COURT INFORMATION TECHNOLOGY EXTRANET". To the right of the logo, there are links for "Guardianship Registry Home", "About", "Contact", and "Logout". Below the logo, the user information is displayed: "User: Cook, Nadisha (NWCOOK)", "Current App: Guardianship Registry (QA)", and "Version: 2.3.0". Further down, the location information is shown: "State: IN", "County: DeKalb", and "Organization: DeKalb Circuit Court (17C01)".

The main content area is titled "Copy Case" and includes a "Case Number: 17C01-1508-GU-000047". On the left side, there is a "Return to Case Summary" link. The main content area contains the instruction: "Please check the Party or Parties you want for the new case:". Below this instruction, there are three checkboxes: "Petitioner" (unchecked), "Guardian" (checked), and "Interested Party" (checked). At the bottom of the main content area, there is a "Copy Case" button with a document icon.

You will then be taken to the Case Information screen so that you can enter the new case information. The parties you selected to bring over into the new case will be prepopulated as indicated in the left navigation pane of the Create Case process. Continue to create the case as described above.

*NOTE: You may now use Copy Case for Expired Cases.*

Guardianship Registry Home • About • Contact • Logout  
 User: Epperson, Lajuan (LEPPERSONQA) Current App: Guardianship Registry (QA) Version: 2.3.0  
 State: IN County: Adams Organization: Adams Circuit Court (01C01)

Home Case/Document Creation Search Reports

Case Information Case Number: 01C01-1404-GU-000TBD

Case Information  
 Petitioner  
 Protected Person  
 Guardian  
 Interested Party  
 Case Details  
 Case Summary

Court  Adams Circuit Court  
 Year  2014 Month  4 - Apr  
 Case Type GU  
 Filing Sequence  000TBD  
 Guardianship Type  Adult/Minor Type   
 Temporary  Adult  
 Permanent  Minor  
 Protected Person Currently in CHINS  
 Related Cases

Guardianship Registry Home • About • Contact  
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### Terminate Guardianship

The Terminate Guardianship task will only be available on cases that have a Letter Issued date. To show that the guardianship was terminated, select the Terminate Guardianship option from the left navigational pane. Enter the date the guardianship was terminated, the reason for the termination, and then select the 'Submit' button. Once the case shows the terminated guardianship terminated, the Order Terminating Guardianship will be available in the Print Forms list. The case status will change from Active to Terminated.

Guardianship Registry Home • About • Contact • Logout  
 User: Epperson, Lajuan (LEPPERSONQA) Current App: Guardianship Registry (QA) Version: 2.3.0  
 State: IN County: Adams Organization: Adams Circuit Court (01C01)

Home Create Case Search Reports Admin

Actions Terminate Guardianship Case Number: 01C01-1404-GU-001254

[Return to Case Summary](#)

Terminate Date   
 Terminate Reason  the protected person is no longer incapacitated and in need of a guardian.  
 the protected person is now deceased.

Guardianship Registry Home • About • Contact  
 ©2014 Judicial Technology and Automation Committee

### Venue Case In

To venue a case into your county, you will need to click the "Venued In" cases link under the Alerts bar.

## Alerts

[You have 3 venued in cases.](#)

[You have 3 venued out cases.](#)

Your results will be displayed beneath the Alerts bar. Choose the case Number to Venue In.

Venue In			
Case Number	From County	To County	Venue Out Date
02D09-1506-GU-000044	Allen	Grant	6/4/2015 12:08:27 PM
17C01-1505-GU-000013	DeKalb	Marion	6/4/2015 2:05:01 PM
11C01-1504-GU-546531	Clay	Blackford	6/9/2015 1:21:08 PM

You will come to the Case Information Screen for importation of the Venued case. You can continue to select the 'Next' button to review the data, until you reach the Case Summary Screen; or select the Case Summary Screen directly from the left navigation. **(For Odyssey Counties navigate to the Case Details Screen or Select the Case Details Screen directly from the left navigation and click Submit)**

Case Information Case Number: 11C01-1504-GU-546531

Court  Clay Circuit Court

Year  2015 Month  04

Case Type GU

Filing Sequence  546531  Foreign

Related Cases

- 17D02-1504-GU-000019
- 11C01-1504-GU-546531

[+ Add Related Case](#)

[Save](#) [Next](#)

On the Case Summary Screen, your case will show a **Pending** Status.

### Venue Case Out

To venue a case out of your county, you will need to either search by the case number, or from your Recent Cases list on the homepage.

Recent Cases		
Case Number	Protected Person	Status
02D09-1506-GU-000044	Mark Young ---- Temporary Adult	Pending
11C01-1504-GU-546531	Anders Mubasa ---- Permanent Adult	Active

After selection, you will come to the Case Summary Screen. From the left navigation under “I want to...” select the Venue Out option.

I want to .....

- Add Attachment
- Add Case Note
- Revoke Letter
- Copy Case
- Terminate Guardianship
- Venue Out



At the next screen, select the county from the dropdown options. Click on the Add button. You will return to the Case Summary Screen, where your case will show a **Pending** Status.

If for any reason you created this in error. Select the ‘Cancel Venue’ Out option from the left navigation, under the “I want to...”

I want to .....

- Cancel Venue Out

## Print Forms

There are eleven forms that can be generated from the system. The forms are located on the Case Summary screen in the left navigational pane. The forms that are available are based on the guardianship type and status of the case. The forms available are: *Letter of Guardianship, Certified Letter of Guardianship, Notice of Hearing on Petition for Guardianship, Order Appointing Guardian for Incapacitated Person, Order Appointing Guardian for Minor, Order Appointing Temporary Guardianship for Minor, Order for Report of Physician, Order to Appear to Show Cause, Order Denying Guardianship, Order Dismissing Guardianship and Order Terminating Guardianship.*

To print a form, click on the form name from the left navigational pane. The forms will prepopulate each data field with the required data entered on the case. However, if additional information is needed to complete the form, a pop-up box will appear so that you can enter the additional required fields.

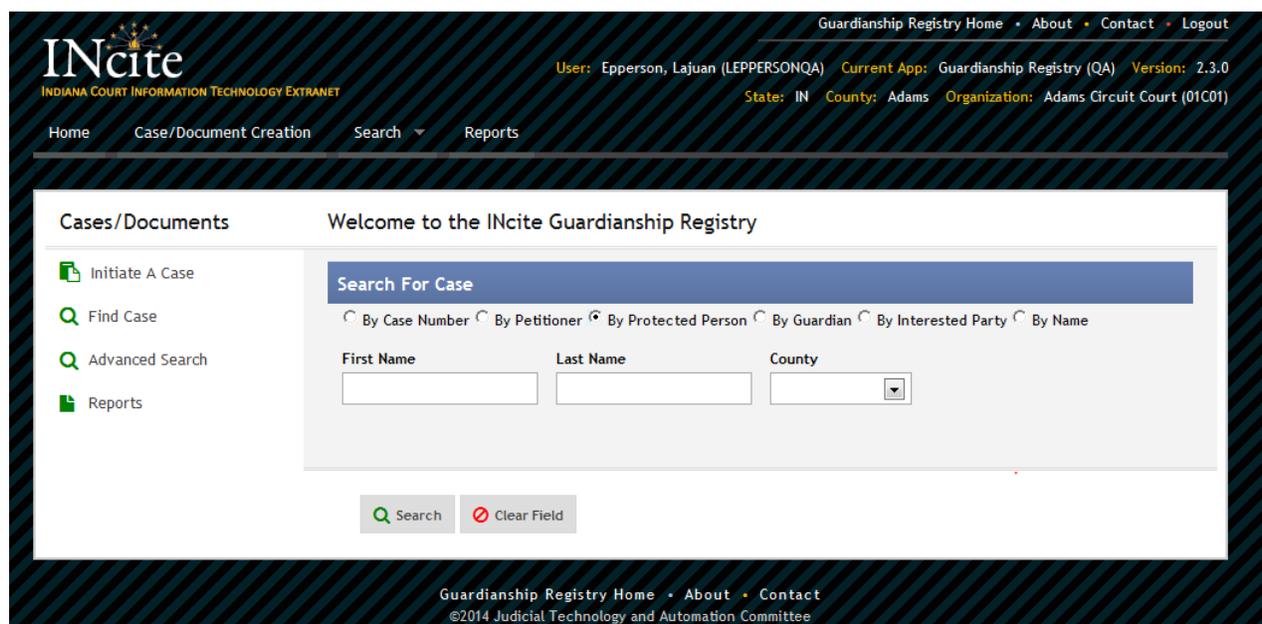
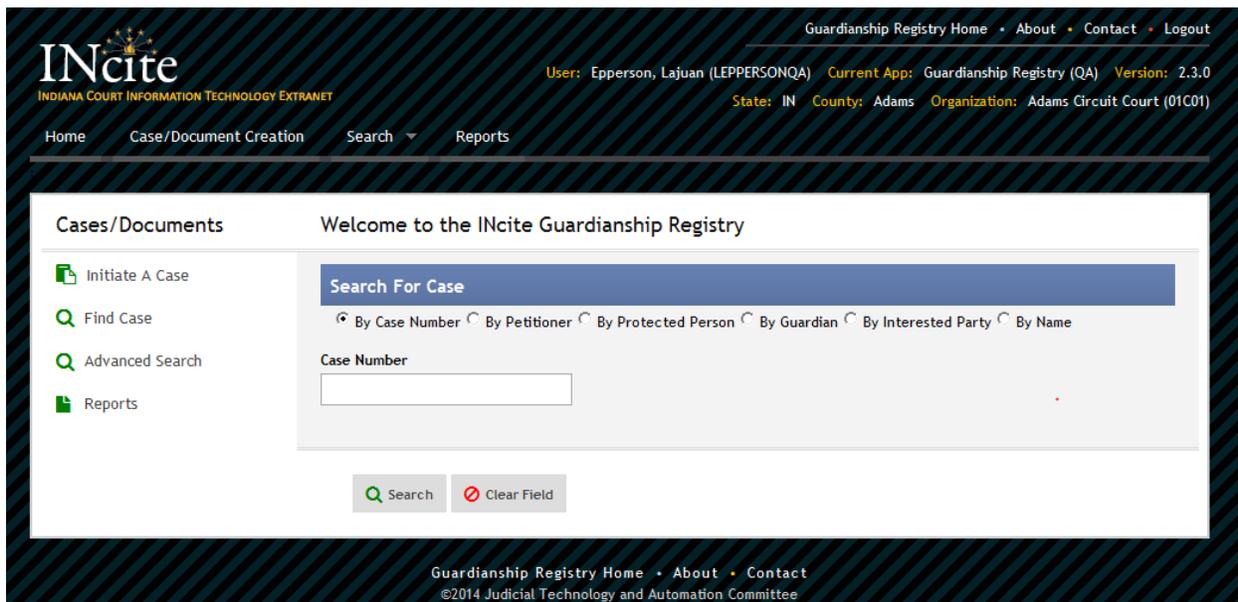
Once you enter the data and click print a new window will open displaying the PDF version of the form so that you can view it before you print it. (Note: Select Shrink to fit, Fit to page or Fit to ensure the form prints correctly.)

The screenshot displays the INcite web application interface. The top navigation bar includes 'Guardianship Registry Home', 'About', 'Contact', and 'Logout'. The user is identified as 'Epperson, Lajuan (LEPPERSONQA)' using the 'Guardianship Registry (Dev)' application, version 2.3.0. The current case information is: State: IN, County: State Agency, Organization: Judicial Technology Automation Committee (JTAC). The main menu includes 'Home', 'Create Case', 'Search', 'Reports', and 'Admin'. The 'Actions' pane on the left shows a 'Return to Case Summary' link and a 'Letter of Guardianship' form. The form includes sections for 'Please Select Protected Person:' (with radio buttons for Henry Williams and Phillip Shanco), 'Please Select Guardian:' (with radio buttons for John Williams, Tony Williams, and Hollow Hill), 'Clerk Name', 'Deputy Clerk Name', and 'Date' (set to 09/24/2014). A 'Print' button is located at the bottom of the form. To the right of the form is a preview of the printed document, which is a 'LETTER OF GUARDIANSHIP' from the State of Indiana, County of Adams, Court in the Adams Circuit Court. The case is 'IN RE: THE GUARDIANSHIP OF Sally Jones', Case No. 01C01-1404-GU-000122. The document certifies that Larry James has been appointed Guardian(s) of Sally Jones and that the Guardian(s) is/are properly qualified. It is witnessed by Sally Sims, Clerk, and Janice Jones, Deputy Clerk, on the 15th day of April, 2014.

## Find Case

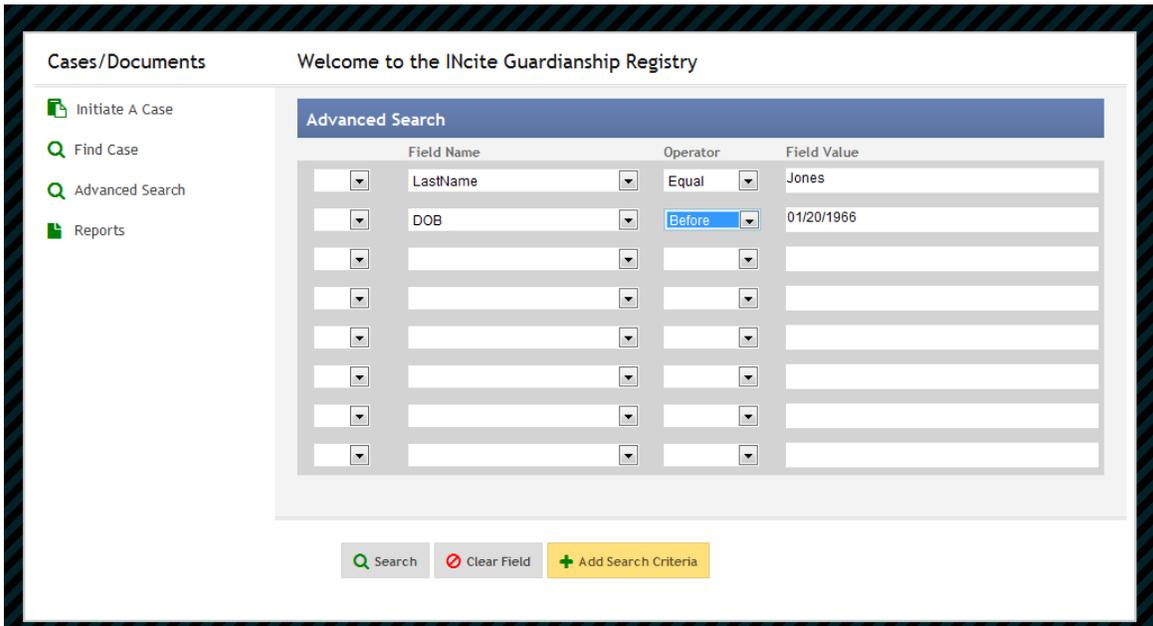
To Find a Case, select the option from the left navigational pane under Cases / Documents. When searching for a case you can search using these options: *Case Number, Petitioner, Protected Person, Guardian, Interested Party, and Name.*

You will be prompted to enter applicable information in each search field for the search option you choose. Use the Clear Field button to enter different search data. Wild cards are automatically built in so you can enter all or part of the information in the search field. The more information you enter, the more specific the search results will be. For instance, if you enter a J you will get all records that have a first or last name beginning with the letter J. If you enter Johns, you will only get records that have the name Johns or whose last names begin with Johns (i.e. Johnson). The cases that meet your search criteria will be displayed. Select the intended case you want to work with by hovering your cursor over the result (selection will be highlighted in red) and clicking.



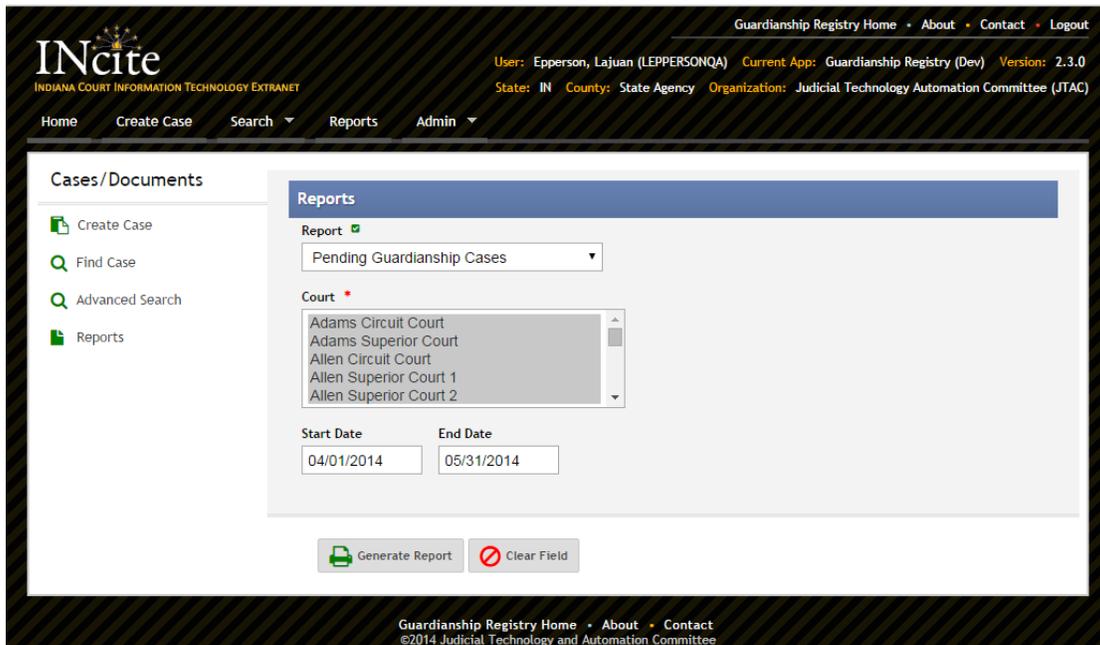
## Advanced Search

The Advanced Search feature allows you to conduct a more detailed search for a case using multiple data criteria that were added when creating the case. To use Advanced Search, select the option from the left navigational pane. Select the first data field you want to use in your search and set the search parameters to ***equals, not equals, before*** or ***after***. Then enter the data you want to search against. You can add as many data fields needed to conduct the Advanced Search for the case.



## Reports

To print a report, select the option from the left navigational pane under Cases / Documents. Under the Reports Header choose the report from the drop down menu, the court, then enter the start and end date and click Generate Report. Each report is generated as a PFD document in a popup window. When needed, you can select Clear Field to re-enter data.



## Pending Guardianship Cases

*Total Records: 56*

Case Number	Case Style	File Date	Related Case Number
01C01-1404-GU-465123	The Guardianship of Adam Lisbeth	4/28/2014	
02D03-1404-GU-000082	The Guardianship of Tonya Jackson	4/28/2014	01C011204JC000123
17C01-1404-GU-000028	The Guardianship of George H Harrison	4/29/2014	
17D02-1404-GU-000029	The Guardianship of Fred Flintstone	4/29/2014	17C01-1404-GU-000026
17D02-1404-GU-000030	The Guardianship of Michael Keith	4/29/2014	
17D02-1404-GU-000031	The Guardianship of Michael Keith	4/29/2014	17D02-1404-GU-000030
32D05-1405-GU-000546	The Guardianship of Jane Mae Hiller	5/5/2014	32c011312JC000123
32D01-1405-GU-000051	The Guardianship of Michelle Jones	5/5/2014	32D05-1405-GU-000050
32D01-1405-GU-000052	The Guardianship of Anne Smith	5/6/2014	32D01-1405-GU-000049
32D01-1405-GU-000053	The Guardianship of Anne Smith	5/6/2014	32D01-1405-GU-000049
32D01-1405-GU-000054	The Guardianship of Anne Smith	5/6/2014	32D01-1405-GU-000049
32D01-1405-GU-000055	The Guardianship of Anne Smith	5/6/2014	32D01-1405-GU-000049
32D01-1405-GU-000056	The Guardianship of Anne Smith	5/6/2014	32D01-1405-GU-000049
32D01-1405-GU-000057	The Guardianship of Anne Smith	5/6/2014	32D01-1405-GU-000056
32D01-1405-GU-000058	The Guardianship of Anne Smith	5/6/2014	32D01-1405-GU-000057
32D01-1405-GU-000062	The Guardianship of Anne Smith	5/7/2014	32D01-1405-GU-000061

## Active Temporary Guardianship Letters

*Total Records: 7*

Name	Case Number	Is Minor	Letter Date	Expiration
Madeline Joseph	01C01-1407-GU-001233	Y	7/1/2014	9/29/2014
Larry B James	40D01-1407-GU-000022	N	7/11/2014	10/9/2014
Jason Brown	40D01-1407-GU-000023	Y	7/11/2014	10/9/2014
Carlos Cowan	17C01-1409-GU-000050	Y	9/19/2014	12/18/2014
Wilma Flintstone	17C01-1409-GU-000047	N	9/15/2014	12/14/2014
Chester Smith	02D02-1409-GU-000178	Y	9/16/2014	12/13/2014
Sandra Marie James	20C01-1409-GU-000098	Y	9/2/2014	12/1/2014

There are 20 reports that can be generated for your court and/or county. Each report provides different data sets based on the report type. These report types are described below.

- **Pending Guardianship Cases** - all cases that have an Order Date and has not been denied or dismissed.
- **Active Guardianship Cases** - all cases that have an Order date and has not been denied, dismissed or terminated and has at least one active letter of guardianship.
- **Temporary Guardianship Letters** - all active Temporary Guardianship Letters that have not expired or been revoked and an active Permanent Guardianship Letter has not been issued on the incapacitated adult/child.
- **Permanent Guardianship Letters** - all active Permanent Guardianship Letters that is not expired, terminated or been revoked.
- **Expiring Cases** - all active letters with an expiration date equal to or greater than the current date; ordered by earliest expiration date.
- **Terminated Guardianship Cases** – all cases that have a termination date equal to or earlier than the current date; ordered by earliest Termination Date.
- **Denied Guardianship Cases** – all cases that have a denied date equal to or earlier than the current date; ordered by earliest Termination Date.
- **Dismissed Guardianship Cases** – all cases that have a dismissed date equal to or earlier than the current date; ordered by earliest Termination Date.

- **Accounting Due** - all cases where the Guardianship Type is Estate or Both and the Accounting Filed is set to No.
- **Inventory Due** – all cases where the Guardianship Type is Estate or Both and the Inventory Filed is set to No.
- **Guardian Training Required** – all active cases where the Guardian Training Required field is set to Yes and the Training Completed date is null.
- **Guardian Training Completed** – all cases where the Guardians Training Completed Date is populated with a date on or before the report date.
- **Certified Guardians** -all Guardians where the Certified Guardian is set to Yes.
- **Adult Guardianship Letters** – all active letters where the Guardianship type is Adult.
- **Minor Guardianship Letters** - all active letters where the Guardianship type is Minor.
- **Guardianship Cases w/Related CHINS** – all cases that have the Protected Person Currently is CHINS check box checked.
- **Foreign Guardianships** - all cases has Is Foreign box checked.
- **Revoked Guardianships** - all guardians has letter revoked as guardian.
- **Deny Petitioner**- all guardians has letter Denied as guardian.
- **Assigned Attorney**- all attorneys that are assigned to a protected person. Generous

## Quick Links

There are two options under the Quick Links header which will allow you to find a case or cases without using the standard search. Simply click one of the options and the appropriate list of cases will appear on the right. The 2 options are: Hearings Today and Recent Cases. Click on the case you want to work with by hovering your cursor over the case information (selection will be highlighted in red).



## Hearings Today

This feature allows you to see any cases that have a hearing scheduled for today. To check to see if there are any cases that have a hearing today or any particular day select the link from the left navigational pane. Your court will be defaulted in the court selection box but you can select a different court in your county if applicable. The date will be defaulted to today's date but you may choose a different date. Click 'Search' to view the list of cases. To view the case, hover over it and click on the case when it is highlighted in red.

The screenshot shows the INcite Guardianship Registry interface. The top navigation bar includes 'Guardianship Registry Home', 'About', 'Contact', and 'Logout'. The user is identified as 'Epperson, Lajuan (LEPPERSONQA)' in the 'Adams' county, 'Adams Circuit Court (01C01)' organization. The main content area is titled 'Welcome to the INcite Guardianship Registry' and features a 'No Alerts' message and a 'Scheduled Hearings' section. The 'Scheduled Hearings' section includes a search filter for 'Adams Circuit Court' and a date of '04/18/2014'. Below the search filter is a table of scheduled hearings:

Case Number	HearingDate	Protected Person	Guardianship Type
01C01-1404-GU-000012	04/18/2014 9:00 AM	Amanda James, Tammy James	Permanent Adult
01C01-1404-GU-000122	04/18/2014 10:00 AM	Sally Jones	Permanent Adult

## Recent Cases

This feature shows you the last 10 cases you, as the user, have accessed. To access this list, click on the link from the left navigation pane. The Recent Cases List is always available on the homepage. To access a case from this list, hover over it and click on the case when it is highlighted in red.



## Odyssey Interface

The Guardianship Registry will interface with the Odyssey CMS to allow the case information to flow between the two systems. The case **must** be started in the Guardianship Registry so that the case can be created in Odyssey electronically. The interface includes Case Creation, Party Creation/Update, Attorney Assignment and Case Events. Once the case has been created in Odyssey through the interface, party updates and most case events will flow both ways. (Please note: **Hearings must be added in Odyssey.**)

### Case Creation

The following Case Events will flow to Odyssey when the case is created in the Registry through the interface. Additional case events will be added to the case based on the data that is entered in the Registry i.e. Appearance Filed and Oath Filed.

QCSNEW	<b>Case Opened as a New Filing</b>
PEG	<b>Petition to Establish Guardianship Filed</b>
PETG	<b>Petition for Emergency/Temporary Guardianship Filed</b>

### Party Creation/Update

**All** new parties must be added to the case in the registry to ensure that all required data is captured in the registry. After the party has been added to Odyssey through the interface, updates to the party record can be added in Odyssey and it will update the party record in the registry.

**Odyssey Counties:** All parties relevant to case (*Protected Person, Petitioner, and Guardian*) are required before submission to Odyssey. Guardian will not go up until Guardianship is Active.

## Attorney Assignment

When an attorney is added to the party record in the Registry, either at the initial case creation or afterwards, the attorney will be added to the appropriate party in Odyssey. The Appearance Filed event will be added to the case as well. If Pro Se is added in Odyssey, it checks the Pro Se box in Guardianship Registry. If Pro Se is marked in Guardianship Registry, it sends up Pro Se under Attorney information in Odyssey.

<b>APP</b>	<b><i>Appearance Filed (Name)</i></b>
------------	---------------------------------------

## Case Events Added in Odyssey

When the following events are added to the case in Odyssey, they will be added to the Guardianship Registry Case Event list.

<b>Odyssey Event Code</b>	<b>Event Description</b>
<i>SI</i>	<i>Service Issued</i>
<i>SRS</i>	<i>Service Returned Served</i>
<i>SRNS</i>	<i>Service Returned Not Served</i>
<i>ADMWCPA</i>	<i>Waiver/Consent to Proposed Action Filed</i>
<i>LG</i>	<i>Letters of Guardianship Issued</i>
<i>ORD</i>	<i>Order Issued</i>
<i>OAPT</i>	<i>Order of Appointment</i>
<i>OGTG</i>	<i>Order Granting Temporary Guardianship</i>
<i>PR</i>	<i>Physician's Report Filed</i>
<i>CBP/SBP</i>	<i>Cash/Surety Bond Entered in Clerk's Office</i>

When the following events are added to the case in Odyssey, the associated action will be updated in the Guardianship Registry.

<b>Events added in Odyssey</b>	<b>Event Description</b>	<b>Update to Registry</b>
<i>*HSACT</i>	<i>Hearing Scheduling Activity</i>	<i>Populate Hearing Date and Time</i>
<i>ODPEG</i>	<i>Order Denying Petition to Establish Guardianship</i>	<i>Populate Order Denied Date</i>
<i>ODIS</i>	<i>Order of Dismissal</i>	<i>Populate Order Dismissed Date</i>
<i>ARJBOND</i>	<i>Court Set Bond</i>	<i>Set Bond Filed to Yes</i>
<i>CBP/SBP</i>	<i>Cash/Surety Bond Entered in Clerk's Office</i>	<i>Set Bond Posted to Yes</i>
<i>OGMTGU</i>	<i>Order Granting Motion to Terminate Guardianship</i>	<i>Populate Order Terminated Date</i>
<i>ADMOAF</i>	<i>Oath Filed</i>	<i>Set Oath Filed to Yes</i>
<i>LG</i>	<i>Letters of Guardianship Issued</i>	<i>Populate Letter Issued Date</i>
<i>OGTG/OGPEG</i>	<i>Order Granting Temporary Guardianship / Petition to Establish Guardianship</i>	<i>Populate Order Date</i>
<i>CCIE</i>	<i>Administrative Event</i>	<i>Deletes Case</i>

\* This event must be entered in Odyssey.

When the following actions are taken in the Guardianship Registry, the associated case event will be added to the case in Odyssey.

<b>Action Taken in Registry</b>	<b>Odyssey Event Code</b>	<b>Case Event added To Odyssey</b>
<i>Deny Petition</i>	<i>ODPEG</i>	<i>Order Denying Petition to Establish Guardianship</i>
<i>Dismiss Petition</i>	<i>ODIS</i>	<i>Order of Dismissal</i>
<i>Populate Order Terminated Date</i>	<i>OGMTGU</i>	<i>Order Granting Motion to Terminate Guardianship</i>
<i>Set Bond Filed to Yes</i>	<i>ARJBOND</i>	<i>Court Set Bond</i>
<i>Populate Bond Posted Date</i>	<i>ADMBFF</i>	<i>Bond Form Filed</i>
<i>Set Oath Filed to Yes</i>	<i>ADMOAF</i>	<i>Oath Filed</i>
<i>Set Accounting Filed to Yes</i>	<i>AJAACC</i>	<i>Accounting Filed</i>
<i>Set Inventory Filed to Yes</i>	<i>ADMINV</i>	<i>Inventory Filed</i>
<i>Populate Order Date</i>	<i>OGTG/OGPEG</i>	<i>Order Granting Temporary Guardianship / Petition to Establish Guardianship</i>
<i>Populate Letter Issued Date</i>	<i>LG</i>	<i>Letters of Guardianship Issued</i>
<i>Add GAL/CASA Name</i>	<i>QCSGAL</i>	<i>GAL/CASA Appointed</i>
<i>Set Instructions Filed to Yes</i>	<i>IE</i>	<i>Instructions Executed</i>
<i>Set Status Report Filed to Yes</i>	<i>AJAREP</i>	<i>Status Report Filed</i>

#### Event Code for Pre-existing GU Cases

You may now add pre-existing Guardianship cases from Odyssey. When the new event code MEGUR (*Added to Transmit to GU Registry*) is added, it will automatically enter the case into INCite’s Guardianship Registry. – See Cheat Sheet for details.

## Guardianship Registry Support Information

**Production Site:** <https://mycourts.in.gov>

#### **Court Technology Help Desk Hours:**

Monday – Friday: 8:00am to 5:30pm (EST)

**Court Technology Help Desk Phone Number:** 1.888.275.5822

**Court Technology Help Desk Email:** [helpdesk@courts.in.gov](mailto:helpdesk@courts.in.gov)