

Guardianships

Why the Change

Practice has varied considerably across the state, with some jurisdictions closing guardianships as soon as they are established, some closing them when the guardianship ceases, and others keeping them open indefinitely. It has not been possible to provide accurate numbers of active guardianships or to monitor guardians' compliance with annual reporting requirements.

Filing

The cover sheet for probate is broad because case types vary a lot in probate. The AOC does not specify who needs to be included on the cover sheet, though at a minimum the petitioner should be included.

Disposition

- You should receive a disposition sheet in addition to the order.
- Enter the appropriate docket code for the disposition (typically MDJD or MDDM) and associate it with the manner of filing.
- If the case is set for review (if the guardianship was granted), also enter MSSD – this will set the case status to Set for Review.

Once you have done these things, guardianship cases will count as disposed/closed but will also appear in a report of all cases set for review.

On an ongoing basis

In guardianship cases, an annual report is required. When that report is received, enter the appropriate docket code:

- FI03/FI03\$: accounting by guardian and/or
- FI47: annual report of guardian.

If these are entered, an a report can be run on which guardianship cases are set for review but lacking an annual report or accounting.

For old guardianships

As you work with guardianship files logging annual reports or accounting, or as you have time, enter MDJD with the date that the guardianship was established. Also enter MSSD so they will show up on the set for review report. This will help to clear out your "cases pending" numbers.