COVERSHEET 101- PROBATE

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PHOTOGRAPH CREDIT
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KUAR NEWS

Building Bridges

Arkansas Court Automation Program Systems Conference 2017

TRAINING DESCRIPTION

A hands on training of the Probate Coversheet including how to enter the data into Contexte.

- Target Audience: County Clerks

PROBATE CASE TYPES

==(GA) Guardianship of an Adult – New as of 01JAN17==

==(GJ) Guardianship of a Juvenile – New as of 01JAN17==

(AD) Adoption

(DE) Decedent Estate Administration

(PC) Adult Protective Custody

(AL) Alcoholic Commitment

(AA) Ancillary Administration

(DC) Narcotic Commitment

(CV) Civil Commitment

(SE) Small Estate

(CP) Conservatorship

(TA) Trust Administration

(OP) Probate-Other

Remember:
(GD) Guardianship – Probate
ENDED 01JAN17

Please **DO NOT USE**

COVERSHEET CONTEXTE CHEAT SHEET

#2017ACAP

COVER SHEET
STATE OF ARKANSAS
CIRCUIT COURT: PROBATE

The probate reporting form and the information contained herein shall not be admissible as evidence in any court proceeding or replace or supplement the filing and service of pleadings, orders, or other papers as required by law or Supreme Court Rule. This form is required pursuant to Administrative Order Number 8. Instructions are located on the back of the form.

County: _____   District: _____   Filing Date: _____

Judge: _____   Division: _____   Case ID: _____

Type of case (choose one):

☐ (AD) Adoption
☐ (PC) Adult Protective Custody
☐ (AL) Alcoholic Commitment
☐ (AA) Ancillary Administration
☐ (CV) Civil Commitment
☐ (CP) Conservatorship

☐ (DE) Decedent Estate Administration
☐ (GA) Guardianship of an Adult
☐ (GJ) Guardianship of a Juvenile
☐ (DC) Narcotic Commitment
☐ (SE) Small Estate
☐ (TA) Trust Administration
☐ (OP) Probate-Other

In the Matter of: _____

Does this case involve the custody or support of minor children? ☐ Yes ☐ No
If yes, also file the completed Confidential Information Sheet.

Participant 1			Participant 2		
Participant Type			Participant Type		
Company/ Last Name			Company/ Last Name		
Suffix			Suffix		
First Name			First Name		
DL/State ID			DL/State ID		
Address			Address		
City, State ZIP			City, State ZIP		
Phone			Phone		
Email			Email		
Self-represented	☐ Yes	☐ No	Self-represented	☐ Yes	☐ No
DOB			DOB		
Date of Death			Date of Death		
Interpreter needed	☐ Yes: _____ (language) ☐ No		Interpreter needed	☐ Yes: _____ (language) ☐ No	

Attorney of Record: _____   Bar #: _____
Party representing: _____   Atty Email Address: _____

Related Case(s): Judge: _____   Case ID(s): _____

Manner of filing (choose one):   ☐ (MFO) Original   ☐ (MFR+case type) Re-open
☐ (MFT) Transfer   ☐ (MFF) Reactivate

COVER SHEET
STATE OF ARKANSAS
CIRCUIT COURT: PROBATE

Contexte Cover Sheet Forms and Fields

	Form Name	Tab/Field	OR	Form Name	Tab/Field	Notes
1	CMAINIT	County				Enter county #
	CMAINIT	District				Enter as location. Attorneys will use district field to indicate which county seat. Clerk should enter as location in Contexte.
	CMAINIT	Case ID				Assigned by Contexte once you leave the top block.
	CMAINIT	Filing Date				Enter date case is filed with the Clerk.
	CMAINIT	Case Type				Enter Case Type Code Filed.
	CMAINIT	Case Description				Enter name of person that is indicated after the title In the Matter of. Enter Name only do not add In the Matter of in the description.
2	CMAINIT	Party Tab		CDAPRTY		If using automatic judge assignment, the judge/division will be assigned in Contexte. Enter other parties and their information, such as address, etc. If one of the parties is a self-represented party, enter as P, D or whatever type of party; add party status of **SELFREP**
3	CMAINIT	Demographic Tab		CPAIDEN	Demographic Tab	Add or Update the demographic information.
4	CDAPRTY	Language Field				Enter Interpreter Language Needed.
5	CDARELC	Top Block=Enter the case ID to be related			Middle Block=Enter the case ID's to be related	Bottom Block=NEVER CONSOLIDATE CASES!
6	CMAINIT	Short DKT Tab		CDADOCT		Enter in the appropriate manner of filing docket code here using the file date.

COVERSHEET DEMONSTRATION VIDEO

DISPOSITION CONTEXTE CHEAT SHEET

#2017ACAP

DISPOSITION SHEET
STATE OF ARKANSAS
CIRCUIT COURT: PROBATE

The probate reporting form and the information contained herein shall not be admissible as evidence in any other court proceeding or replace or supplement the filing and service of pleadings, orders, or papers as required by law of Supreme Court Rule. This form is required pursuant to Administrative Order Number 8. Instructions are located on the back of the form.

1 Case ID: _____ **1** In the matter of: _____

1 Trial Type: □ (B) Bench Trial   □ (N) Non-Trial

2 Was an interpreter used for this case? □ Yes   □ No

For whom? _____

Language: □ Spanish   □ Sign Language   □ Other: _____

2 Was any party self-represented for any portion of the case?   □ Yes   □ No

If so, who?   _____

3 Disposition Date: _____

Manner of Disposition (Choose one)

4
□ (MDCO) Consolidated into case ID: _____

□ (MDDM) Dismissed

□ (MDJD) Judgment/Decree/Order

□ (MDRB) Removed to bankruptcy court

□ (MDTR) Transferred to another circuit court

Is this case set for review (typical of guardianships)?   □ Yes (MSSD)   □ No (JUC0)

"No" indicates that the case is closed and no court monitoring is legally required.

5 If this case involved guardianship (CSINF):

Guardian name: _____
                first name   last name

Child support ordered: □ New   □ Modified   □ Terminated   □ N/A

Person ordered to pay child support: _____
                                      first name   last name

Was there an order of protection in this case?   □ Yes   □ No

If yes, person(s) protected under the order: _____

_____

Also file the completed Confidential Information Sheet.

DISPOSITION SHEET
STATE OF ARKANSAS
CIRCUIT COURT: PROBATE

Contexte Cover Sheet Forms and Fields

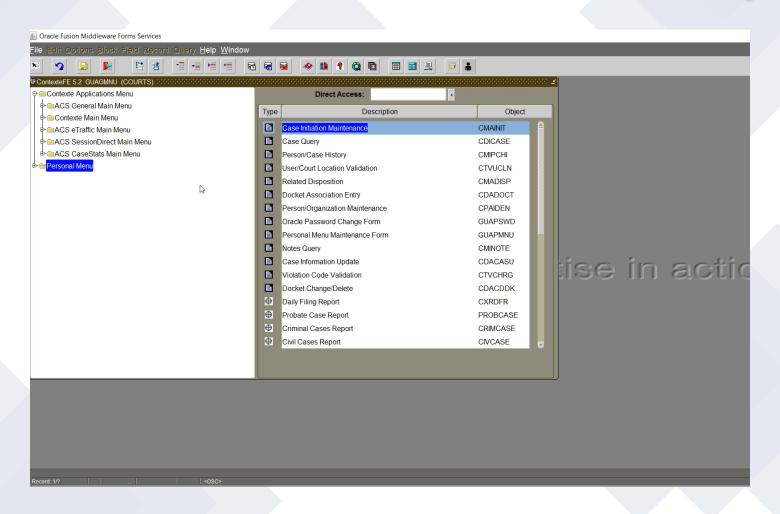|	Form Name	Tab/Field	OR	Form Name	Tab/Field	Notes
1	CMAINIT	Top Block				Case ID Field
	CMAINIT	Top Block				Case Description Field
	CMAINIT	Top Block				Enter Trial Type
2	CDAPRTY	Language Field				The Language for the party should have been entered. If not, enter on CDAPRTY now
	CDAPRTY	Party Status				The party status will be displayed if already entered. If not already entered, enter now.
3	CDADOCT	Second Block				Disposition date is the date the order is filed.
4	CDADOCT	Second Block Third Block- associate the MD to the appropriate MF code.				Enter the appropriate MD code. The disposition date will be the date that the order was filed and the appropriate MD code entered.
5	CDADOCT	Second Block CSINF Third Block- associate the CSINF to the appropriate MF code.				Enter CSINF Choose COASITE in the navigation frame and enter in custody information **NOTE:** PLINF docket code will no longer be available. Associate the MD code and the CSINF codes to the correct MF code.

MANNER OF DISPOSITION KEY TAKEAWAYS

- A case for which a <u>final decree, order, or judgment is entered</u> is considered **disposed** even if the case is carried as active for regularly scheduled reviews.

- In a guardianship case where annual reports are required to the court, the case is considered **statistically closed** but "Set for Review." <u>The status will remain "Set for Review" until the guardianship is terminated</u>.

- If two or more probate cases are consolidated after filing to be processed or tried as one case, each of the cases except for the one into which the cases were consolidated should be reported as disposed at the time of consolidation. When the consolidated case is decided, the disposition should be reported under the appropriate trial type and manner of disposition category.

- **Small estate** cases are <u>immediately closed upon filing the affidavit and cover sheet</u>. The trial type is non-trial and the manner of disposition is judgment.
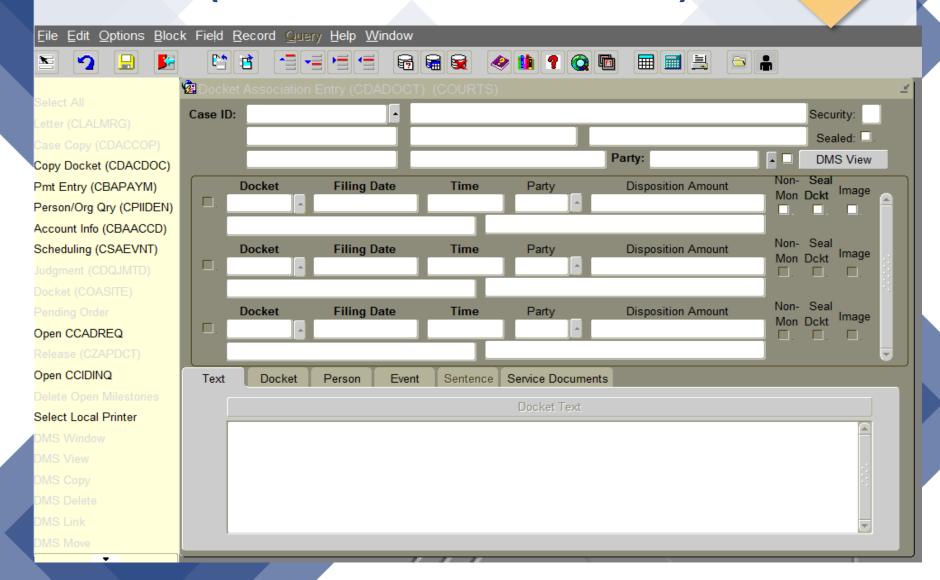
Disposition Demonstration Video

Case Status Rules

- CDADOCT- Applying case status via docket code
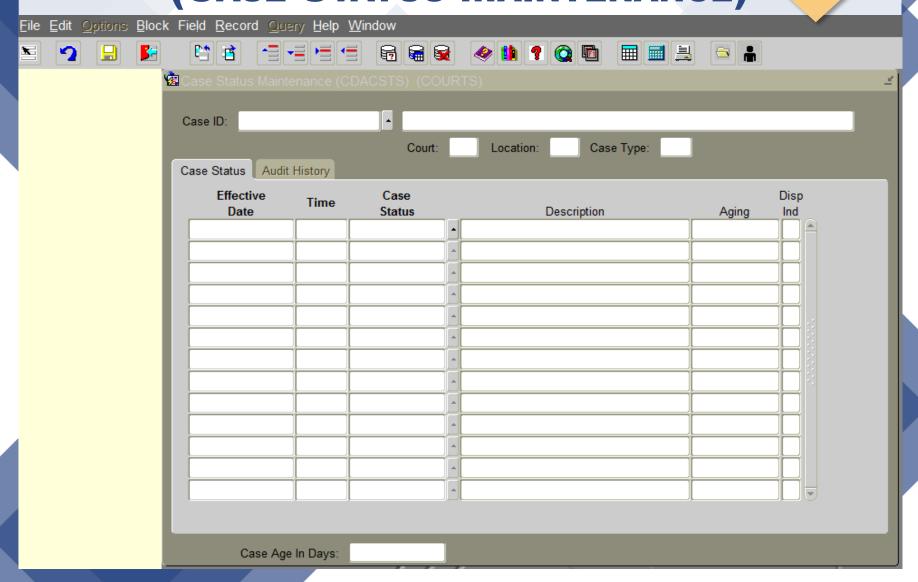
- CDACSTS- Manual entry of case status

CDADOCT
(Docket association entry)

CDACSTS
(Case Status Maintenance)

File Edit Options Block Field Record Query Help Window

Case Status Maintenance (CDACSTS) (COURTS)

Case ID:

Court: Location: Case Type:

Case Status Audit History

Effective Date	Time	Case Status	Description	Aging	Disp Ind

Case Age In Days:

Codes that will Trigger Case Status

- OPEN-case status
  - ➢ MFO – MOF ORIGINAL
  - ➢ MFT – MOF TRANSFER

- CLOSED-case status
  - ➢ JUC0 – CASE CLOSED
  - ➢ MDCO – CONSOLIDATED
  - ➢ MDTR – MOD TRANSFER TO OTHER JURISDICTION
  - ➢ MDJD – MOD JUDGMENT/DECREE/ORDER
  - ➢ MDDM – MOD DISMISSED

Codes that will Trigger Case Status
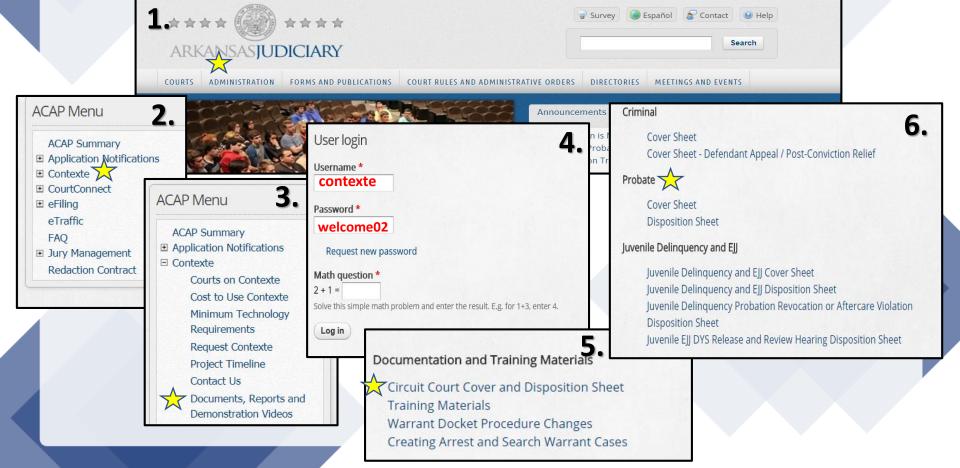
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- INACTIVE-case status
  - ➢ MSIA – MOD INACTIVE
  - ➢ MDRB – MOD REMOVED TO BANKRUPTCY

- REACTIVATE-case status
  - ➢ MFF – MANNER OF FILING REACTIVATED

- REOPEN-case status
  - ➢ MFR + CASE TYPE; when used will update case status

- SET FOR REVIEW-case status
  - ➢ MSSD – MOD SET FOR REVIEW POST-DISP

- MONITORING-case status
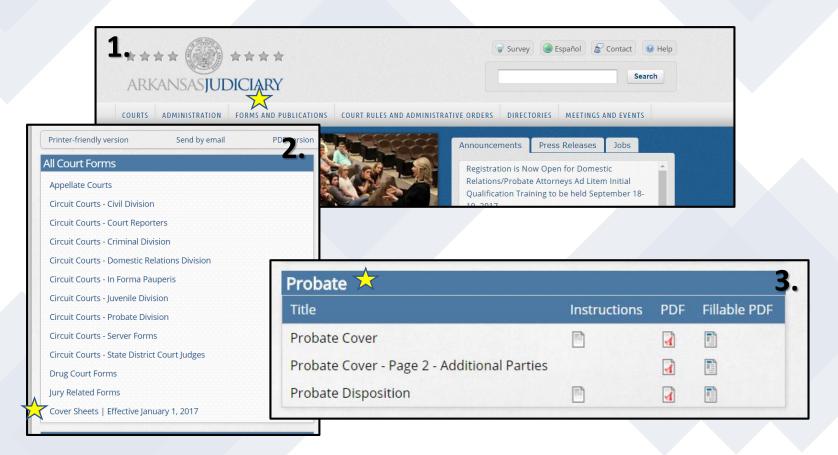 - ➢ NO RULE - Must be manually applied on CDACSTS

RESOURCES

- Judiciary Website https://courts.arkansas.gov/
  - ◊ **CheatSheets**

RESOURCES

- Judiciary Website https://courts.arkansas.gov/
  ◊ **Cover/ Disposition Sheets**

RESOURCES

- Judiciary Website https://courts.arkansas.gov/
  - ◊ **Other Handouts**
    - **-**Old/New Case Types
    - **-**Ended Party Types
    - **-**Case Status Rules
    - **-**Statistical Docket Codes

  - ◊ **Statistical Guide**
    - -Office of Research and Justice Statistics
    - https://courts.arkansas.gov/sites/default/files/ARStatGuide_v1_withcover.pdf

  - ◊ **Administrative Order 8**
    - **-**Guidelines for Coversheets
    - https://courts.arkansas.gov/rules-and-administrative-orders/administrative-orders

Questions?

ACAP Application Support

(501) 410-1900

Option 1