



Navigating the Game of Life Through Probate Cases

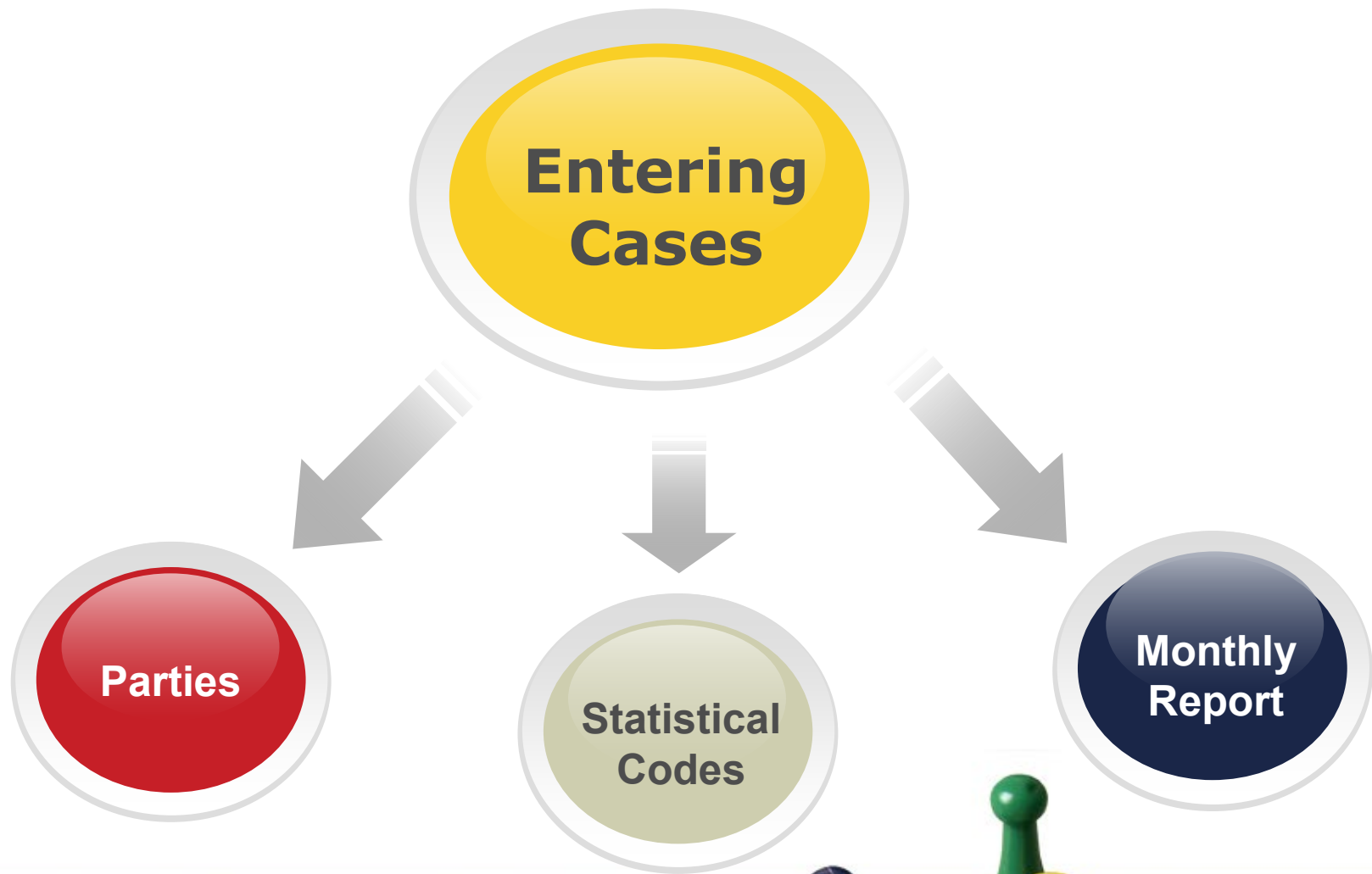
Sheri Cole, Administrative Office of the Courts

Denise Ford, Polk County Clerk's Office

Agenda

- Review several items with opportunities for hands-on practice if desired.
 - Review of Case Entry
 - Review of Cover and Disposition Sheet Cheat Sheets
 - Statistical Opening / Closing Codes
 - Case Status
 - Tip Sheets and Reports





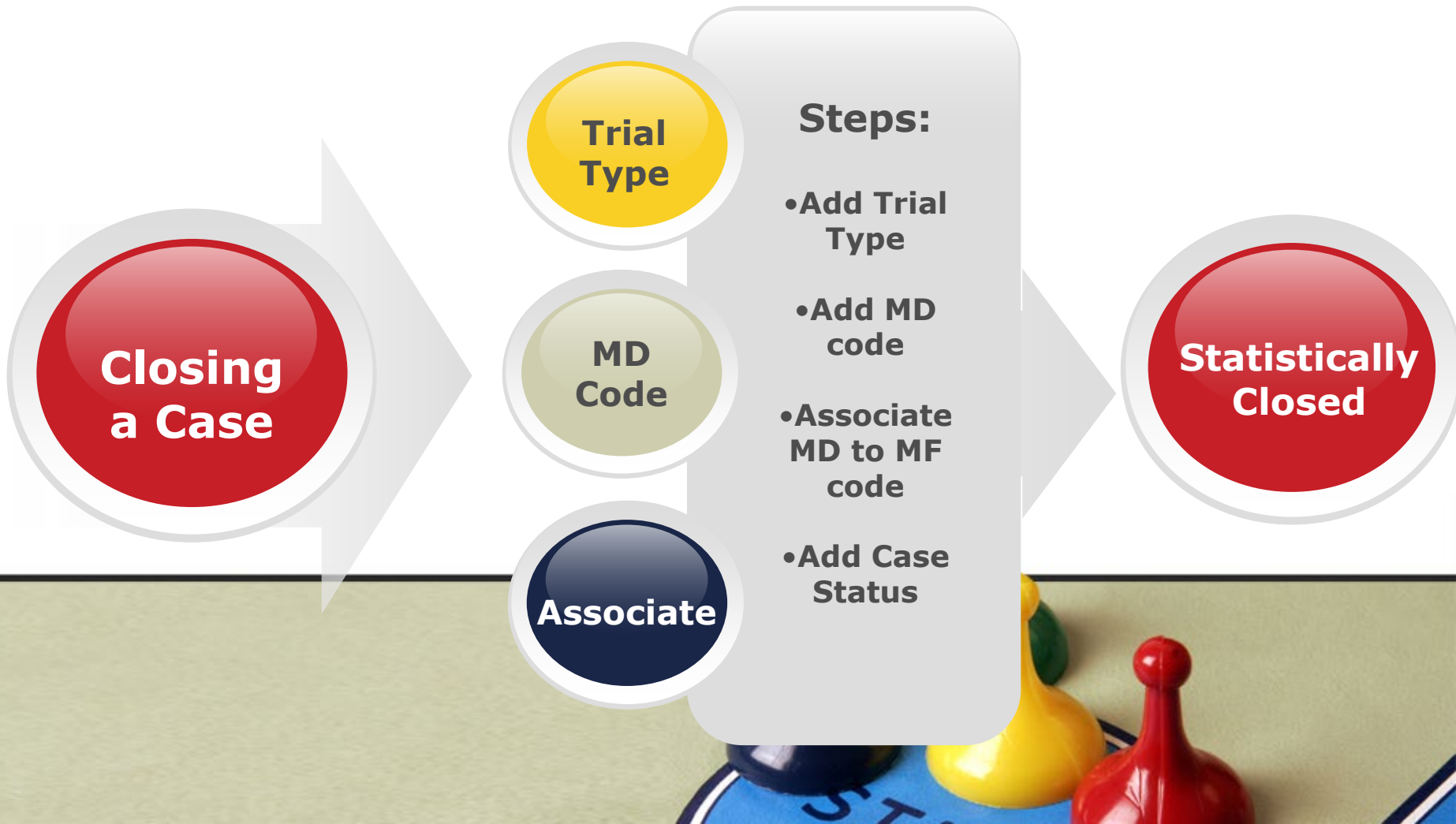
STATISTICAL OPENING DOCKET CODES

Listed at the bottom of the Cover Sheet

- MFO - Original
- MFT - Transfer



CLOSING CASES - General



STATISTICAL DISPOSITION DOCKET CODES

Listed in the middle of the Disposition Sheet

- MDCO – Consolidated into case ID_____
- MDDM – Dismissed
- MDJD - Judgement/Decree/Order
- MDRB – Removed to bankruptcy court
- MDTR – Transferred to another circuit court



CASE STATUS DOCKET CODES

Disposition Sheet – Below Disposition Codes

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.

- MSSD = Set for Review
- JUC0 = Closed

****If adding MSSD, do not add JUC0 at the same time**



ADDITIONAL STATISTICAL CODE

Disposition Sheet – Last Section

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

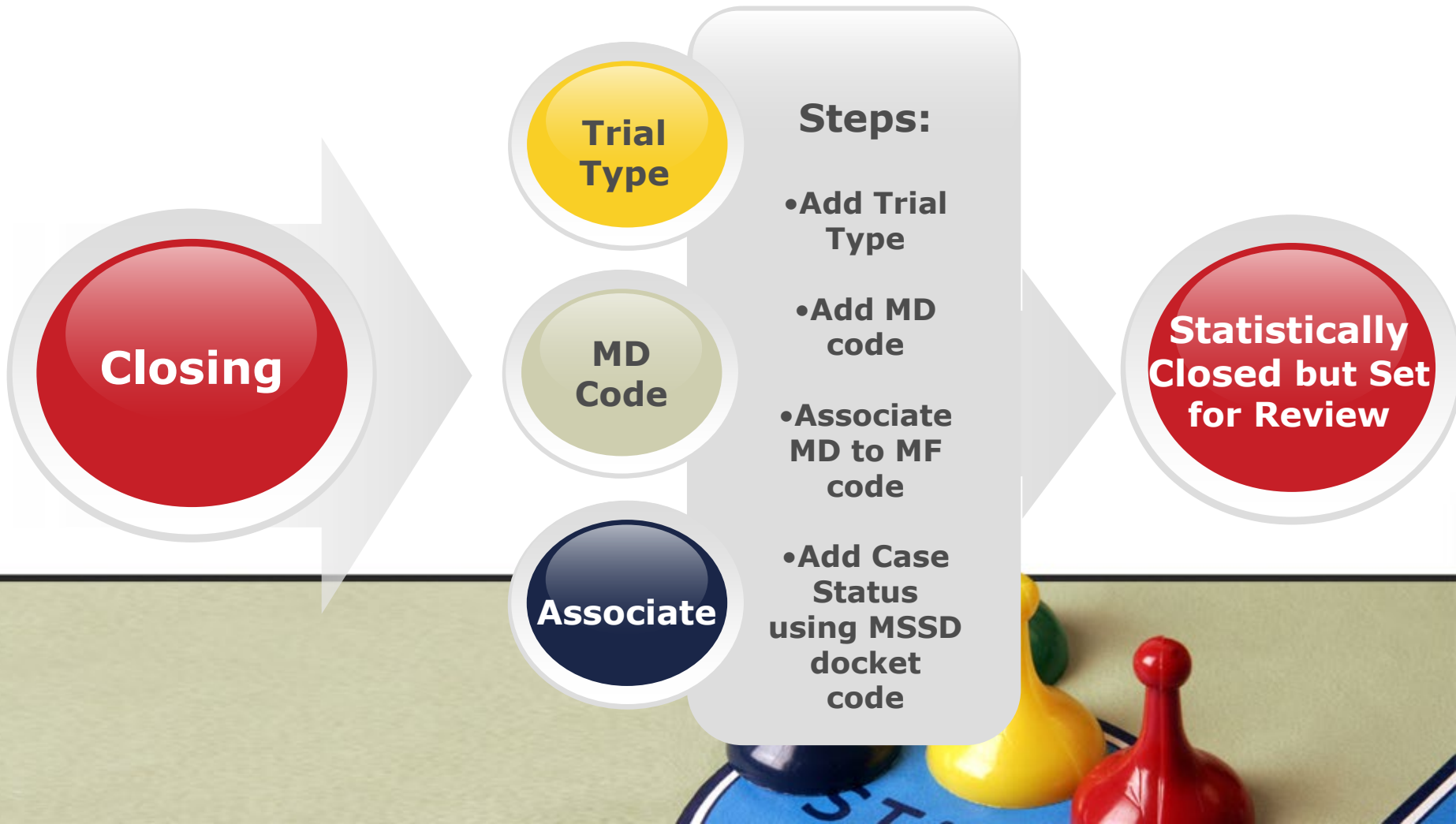
Was there an order of protection in this case? ☐ Yes ☐ No

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



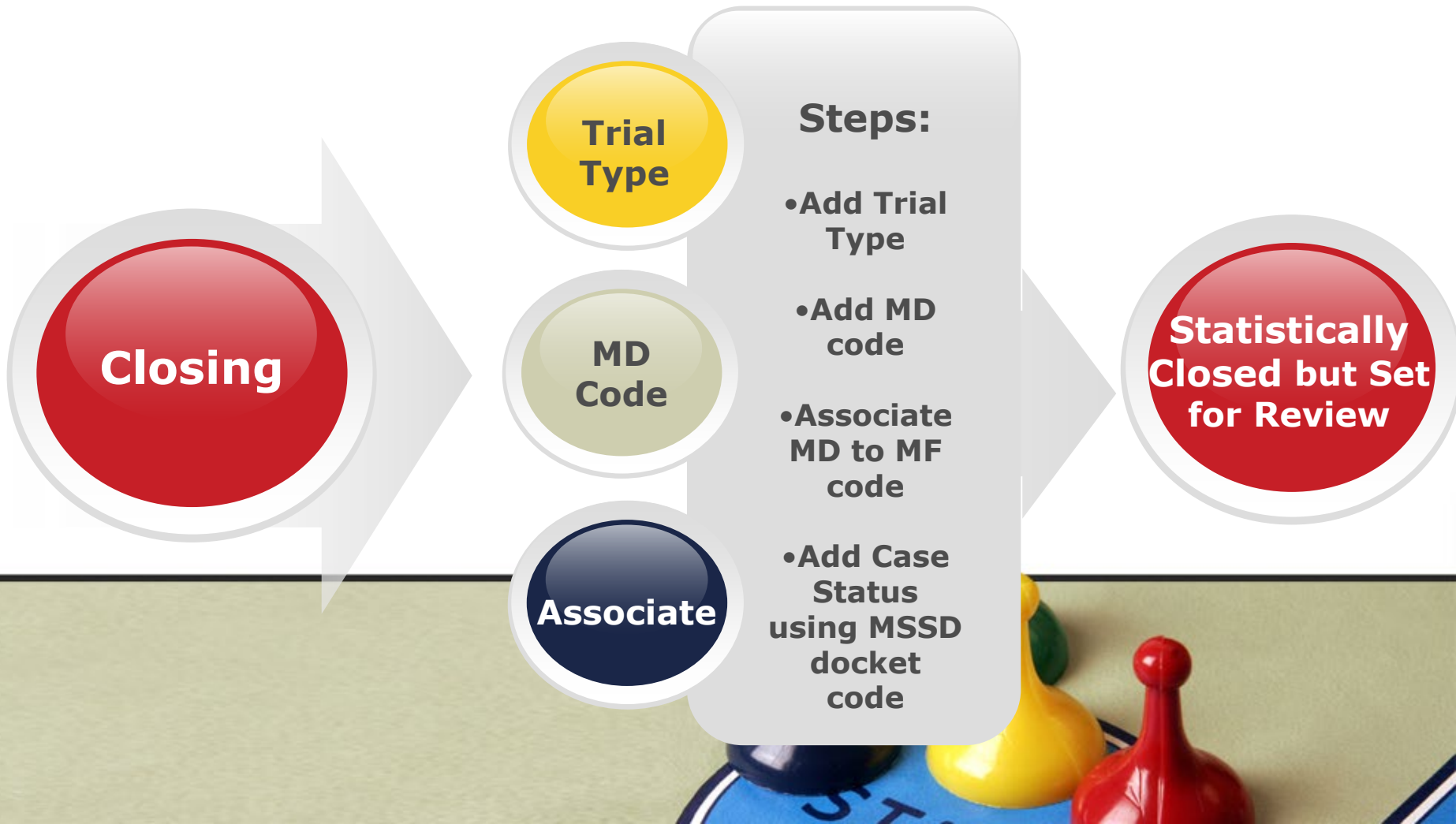
CLOSING CASES

Order - Guardianship Granted

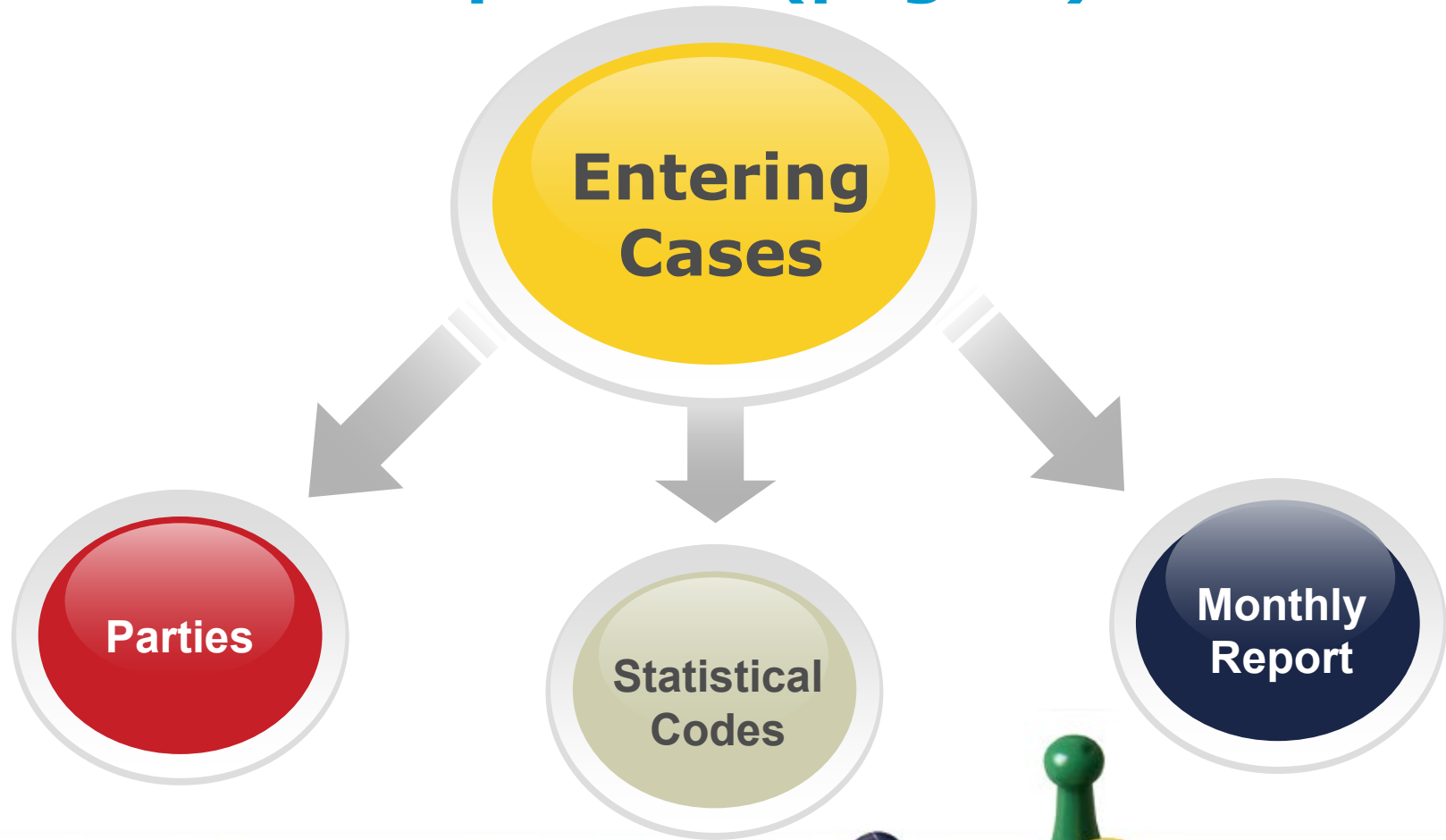


CLOSING CASES

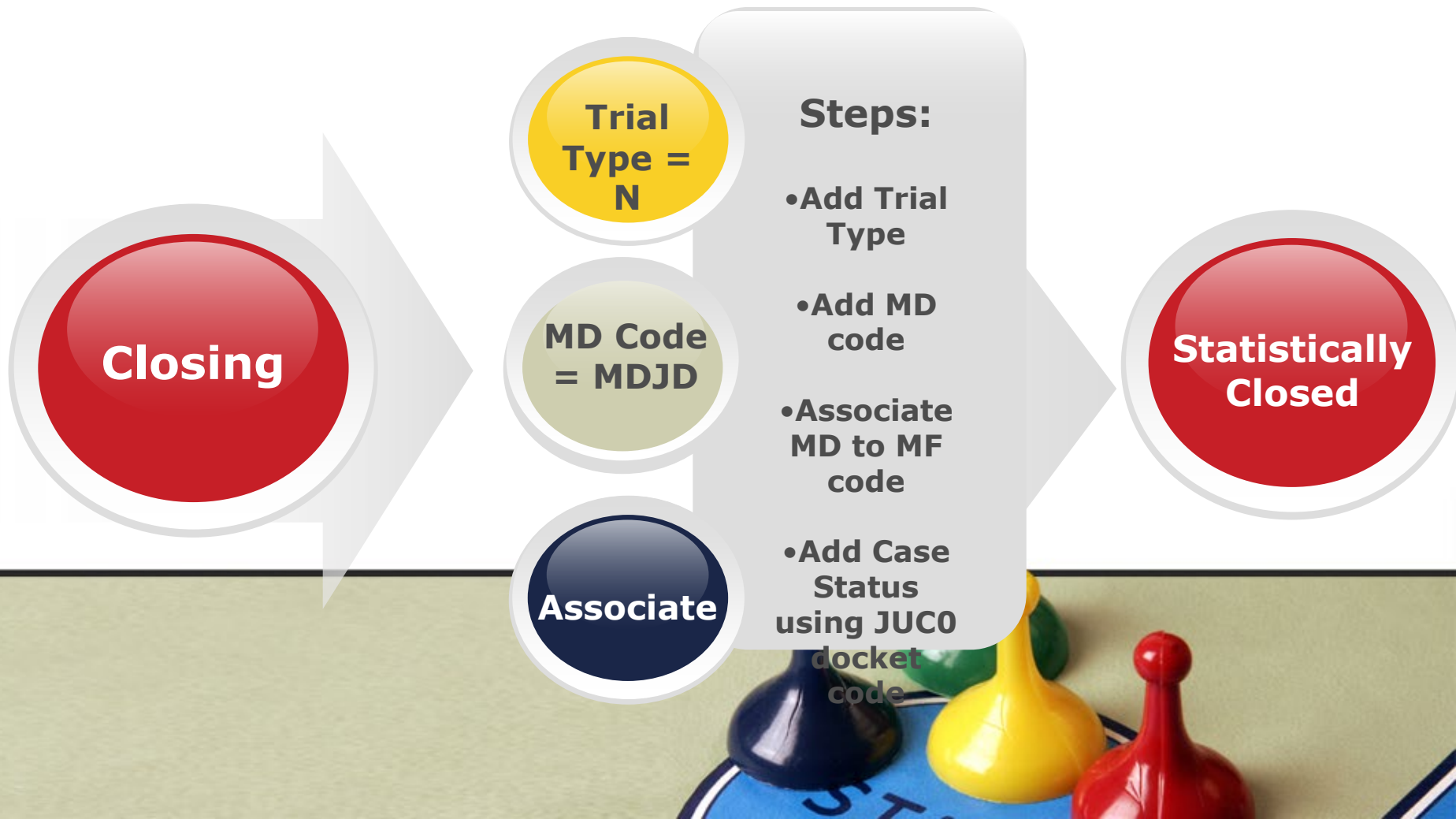
Order – Adult Protective Custody Granted



JV Adoption Transferred from Circuit Tip Sheet (page 2)



JV Adoption Transferred from Circuit Tip Sheet (page 2)



Associating MF and MD Docket Codes

Reminder: Should have entered Trial Type BEFORE MD Code

MF : MD

**One MD to
one MF**

MFR : MD

**One MD to
one MFR**

•MD file date
after MFR file
date

**Case
Status
Code**

**NOT
Associated**

**Monthly
Reports**

**Previous
steps
affect
reports**



Improve your Data Quality Reports

- **Docket Association Report – CXRDKTASSN**
- **Tableau Reports**
 - Provided by Regional Court Administrator
or
 - Reports you run using Tableau Software



DOCKET ASSOCIATION REPORT

CXRDKTASSN

MD Code not associated

No MF Code

MD assoc. to more
than one MF

MD assoc. to more
than one MF

Run Often

- Run Option 1 and correct
- Run Option 2 and correct
- Run Option 3 and correct
- Run Option 4 and correct



Improve your Data Quality

Additional Reports

- **PROBCASE**
 - Dependent upon MF/MD codes
 - Get a listing of active cases
 - Get a list of filed cases
- **CXRDFR – Daily Filing Report**
 - List Filings on Cases
 - Run for 3 months at a time
- **CZRACTV – Activity Report**
 - Must include a User ID or a Judge ID



Material Requests

Would you would like documents emailed for the following?

- Contexte materials
- Tip sheets

Sign up sheets are on the table.





Thank You!

Where do I go next?

Lunch 12 – 1 p.m.

Beginning at 1:10 p.m.

Main Room: Strategic Plan

Ambassador III: Rising Stakes of Cybersecurity

Ambassador I: Being Steve: Crafting New Worlds
for Juveniles

Ambassador II: King Me!...Event Management

Consulate I: Improving Court Schedules

Envoy: The CARCTGL is Right...

