

PROBATE COURT SYSTEM

2013 Spring Release



Judicial Information Systems

PCS Team

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PROBATE ITEMS CONTAINED IN THIS RELEASE

Inventory Fee Distribution
Inventory Fee Calculation
PC 572
Optional Date on Header Screen



Please copy and distribute this document to all court staff using the PCS Application.

The March 2013 update is scheduled to be installed on your system the week of March 25th.

JIS **will not** be sending out a Release CD. The updates will be installed directly to your system by JIS.

Inventory Fee Calculation and Distribution

On January 17, 2013 and February 14, 2013, a memorandum was distributed by the State Court Administrative Office regarding changes to the inventory fee calculation and reporting requirements regarding the distribution of the Inventory Fee. These changes go into effect **March 28, 2013**. The link to the SCAO memorandum is:

[SCAO Memo - Change in Calculating Inventory Fee](#)

[SCAO Memo - Update - Change in Calculating Inventory Fee](#)

Effective March 28, 2013, the inventory fee distribution formula will be changed as follows:

- 47.5% to County General Fund and
- 52.5% to State Shared Fees

Additionally, effective January 1, 2018, the inventory fee distribution formula will be changed as follows:

- 40% to County General Fund and
- 60% to State Shared Fees

The change to the Inventory Fee calculation and allowance for any liens against the real property is dependent upon the date of death:

- For all estates in which the *date of death was before March 28, 2013*, a lien on real property ***shall not be deducted*** from the value of the estate when calculating the inventory fee.
- For all estates in which the *date of death was on or after March 28, 2013*, a lien on real property ***shall be deducted*** from the value of the estate when calculating the inventory fee.

The deduction for the lien cannot be more than the value of the property associated to the lien AND the lien cannot be combined with other real property listed in the inventory.

Example #1: The value of property A is \$75,000.00 and has a lien amount of \$100,000.00 and the value on property B is \$50,000.00 with NO lien amount, the lien deduction would be \$75,000.00 for property A and 0.00 for property B, for a total of \$75,000.00.

Example #2: The value of property A is \$75,000.00 and has a lien amount of \$100,000.00 and the value on property B is \$50,000.00 and has a lien amount of \$10,000.00, the lien deduction would be \$75,000.00 for property A and \$10,000.00 for property B, for a total of \$85,000.00.

Changing the Inventory Fee Distribution

To accommodate the changes in the distribution of the Inventory Fee, you will need to make the following modifications to the Price File (PRM):

- Inactivate the current INV code
- Create a new INV code with an effective date of 3/28/2013

Inactivate the Current Inventory Price Code

Court ID : P 19 MITTSJ		Probate Price File		ACTIVE CODE(S)	
Code	Description	Effect date	Money Type	Amount	Status
IFAX	INCOMING FAX	04/01/2004	CASH	1.00	Y
INV	INVENTORY FEE PAYMENTS	08/20/2012	PERCENT	100.00	Y M
JFF	FILING FEE	10/01/1997	CASH	100.00	Y
JURY	JURY DEMAND	07/01/1999	CASH	50.00	Y

Step 1

- On the NXT TRAN line enter PRM, then <Enter>
 - Locate the INV code and enter "M" to modify the code and select <Enter>
 - You will be routed to the Probate Price File CHANGE screen

Court ID : P 19 MITTSJ		Probate Price File							
		CHANGE							
Price code :	INV	P=%	C=Cash amounts P						
Description :	INVENTORY FEE PAYMENTS	Amount :	100.00						
Effect date MMDD CCYY :	820 2012	Code status :	N (Y-Active N-Inactive)						
Code	MMDD	CCYY	Fund	Activity	Account	Description	Dist.	Amt	PAY
INV			00101-00148.00-00656.003	INVENTORY				60.00	C
SSF			00701-00178.00-00228.000	STATE SHARED FEES				40.00	S

Step 2

- Within the Probate Price File CHANGE screen
 - Modify the Code status from Y to N (Inactive) and select <Enter>
 - Enter your financial password, select <Enter> and then <F10> to update
 - The price code is now inactive. It can be viewed by selecting the F7=Active/Inactive Codes key.

Add the New Inventory Price Code

Court ID : P 19 MITTSJ		Probate Price File		ACTIVE CODE(S)	
Code	Description	Effect date	Money Type	Amount	Status
AFR	ATTORNEY FEE REIMBURSEMENT	00/00/0000	PERCENT	100.00	Y A
APPA	CIRCUIT/COURT OF APPEALS	00/00/0000	CASH	25.00	Y -
BOND	BOND PAYABLE	00/00/0000	PERCENT	100.00	Y -

Step 1

- From the Probate Price File enter "A" next to any Price Code displayed on the screen and select <Enter>

Court ID : P 19 MITTSJ		Probate Price File						
Price code : INV		ADD						
Description <u>INVENTORY FEES</u>		P=% C=Cash amounts <u>P</u> Amount : <u>100.00</u>						
Effect date MMDD CCYY : <u>328 2013</u>		Code status : <u>Y</u> (Y-Active N-Inactive)						
Code	MMDD CCYY	Fund	Activity	Account	Description	Dist.	Amt	PAY
INV		00101-00148.00-00656.003			INVENTORY		47.50	C
SSF		00701-00178.00-00228.006			STATE SHARED FEES		52.50	S

Step 2

- Price Code: **INV (This code is required)**
- P=% C=Cash amounts **P**
- Amount: **100**
- Description: **Inventory Fee (or other desc.)**
- Effective Date **3/28/2013**
- Code Status: **Y**
- Code (Line #1) **INV**
- Dist Am (Line #1) **47.50**
- PAY (Line #1) **C (County)**
- Code (Line #2) **SSF**
- Dist Amt (Line #2) **52.50**
- PAY (Line #2) **S (State)**

Select <Enter>, enter in your financial password, select <Enter> and <F10> to update

Court ID : P 19 MITTSJ		Probate Price File		ACTIVE CODE(S)	
Code	Description	Effect date	Money Type	Amount	Status
INV	INVENTORY FEES	03/28/2013	PERCENT	100.00	Y -
JFF	FILING FEE	10/01/1997	CASH	100.00	Y -
JURY	JURY DEMAND	07/01/1999	CASH	30.00	Y -

The new price code displays with the effective date of 03/28/2013

Inventory Calculation

Changes to the inventory calculation become effective on March 28, 2013

- Impacts DA, DE and PE case types
- Date of Death must be on or after March 28, 2013
 - Date of Death must be entered in the 'Optional Date' field
- The inventory is based off from the value of the estate minus any lien amounts on **real** property.
- The statutory change sunsets on December 31, 2017

```

HEADER MOD
CASE# 13000328 TYPE DE XREF # _____ TYPE DE JUDGE 11953 DATE 04052013
NAME DECEDENT, DAVID, _____ SSNO 000000000 OPTIONAL DATE 03282013
ADDRESS _____
CITY _____ STATE _____ ZIP _____ PHONE _____
STATUS 0 CLOSED _____ REOPEN _____ ATTNY _____ PUBLIC P
MICRO _____ DISPO _____ CODE _____ ORIG PR _____
CSE TYPE CHG _____ FROM TYPE _____ CHG VENUE IN _____ RACE _____ ANCILLARY _____
=====
    
```

The Date of Death must be entered in the Optional Date Field for DA, DE and PE case types.

Changes to PE Case Types

As a result of the changes to the inventory calculation, it is now necessary that a fiduciary party type of PER (Small Estates Under \$15,000) is added on all PE case types.

It is also necessary that the inventory fee be added, even if, after the deduction for the real property lien amount, the inventory value is zero.

```

PARTY MOD
CASE# 13000330 TYPE PE XREF # _____ TYPE _____ JUDGE 11953 DATE 4/28/2013
NAME SMALL, ESTHER, _____ SSNO 000000000 OPTIONAL DATE 3/31/2013
STATUS 0 CLOSED _____ REOPEN _____ ATTNY _____ PUBLIC P
MICRO _____ DISPO 2/28/2013 CODE GTD ORIG PR _____
=====
# 1 DESC PER QUALIFICATION KEY AOT DATE 4/28/2013 DUE DATE 4/28/2013
PARTY ACTIVITY KEY _____ DATE _____ MMDD CCYY
COURT ACTIVITY KEY _____ DATE _____
GDNSHIP REVIEW TYPE _____ DATE _____
    
```

Judicial Information Systems

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PARTY INQ
CASE# 13000328 TYPE DE XREF # _____ TYPE DE JUDGE 11953 DATE 4/05/2013
NAME DECEDENT, DAVID, SSNO 000000000 OPTIONAL DATE 3/28/2013
STATUS Q CLOSED _____ REOPEN _____ ATTN _____ PUBLIC P
MICRO _____ DISPO _____ CODE _____ ORIG PR 2/05/2013 1
=====
# 1 DESC IPT QUALIFICATION KEY ROT DATE 4052013 DUE DATE 405 2013
      PARTY ACTIVITY KEY IFC DATE 6152013 MMDD CCYY
      COURT ACTIVITY KEY _____ DATE _____
      GDNSHIP REVIEW TYPE _____ DATE _____

EVENT COMMENT _____ MICRO# _____
INVENTORY LESS LIEN AMT 150,000.00 FEE 425.00 CALC DT 6152013
NEW FIELD LIEN AMT 76,123.00 DATE PAID _____ RECEIPT # _____
    
```

The Inventory Fee is calculated based on the total amount of the assets MINUS any lien amount (real property only).

In this example, the total value of the estate was \$226,123.00, which includes a home with a value of \$100,000. There is a lien against the real estate in the amount of \$76,123.00, making the inventory amount \$150,000.00.

The inventory fee calculation is based on the \$150,000.00 and should be entered in the *Inventory Less Lien Amt* field.

```

EVENT COMMENT PROP VALUE=75,000/LIEN=100,000 MICRO# _____
INVENTORY LESS LIEN AMT 15,000.00 FEE 94.00 CALC DT 5252013
LIEN AMT 75,000.00 DATE PAID _____ RECEIPT # _____

NAME SMITH, JOE,
ADDRESS 188 APPLEWOOD WAY
CITY MARION ST MI ZIP 48888
PHONE 517 555-1212
ATTNY _____ SURETY _____

This example illustrates how the
amounts should be entered if the value
of the real property is less than the
amount of the lien.

NXT TRAN P PTY TYPE INQ CASE NBR 13000329 REC NBR _____
F2=Nxt Tran F3=Exit F4=Prompt F6=System F8=Juvenile F9=Name Lookup Help
F13=Notes F14=Dockets F16=Inv/Date F17=INV. Receipts
    
```

The deduction for the lien amount cannot exceed the value of the real property

EXAMPLE:

- Total inventory
 - \$90,000.00 (including real estate)
- Real estate value
 - \$75,000.00
- Lien on real estate
 - \$100,000.00
- Deduct \$75,000.00

Inventory less lien amount is \$15,000

Report of Decedent Estate Administration Fees SCAO 67

SCAO 67 is based on case types DA, DE and PE and captures the following information:

- Case Number
- Date of Death
- Total Estate Value (before lien deducted)
- Calculated Inventory fee (before lien deducted)
- Total Estate Value (after lien deducted)
- Calculated Inventory fee after Lien Deducted

The total calculated inventory *before and after lien* is also included in the report.

The report will also include all inventory fees COLLECTED by the court during the reporting year, regardless of the date of death.

Approved, SCAO

REPORT OF DECEDENT ESTATE ADMINISTRATION FEES
 Complete for each calendar year starting January 1, 2014 until December 31, 2017. Send the report no later than March 31 following each reporting year to:
 State Court Administrative Office, Trial Court Services Division, Attention: Deb Marks, PO Box 30048, Lansing, MI 48909 or marksd@courts.mi.gov.

Preparer's name	Telephone no.	County	Report year
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Pursuant to MCL 600.871(4), calculate and report the value of all assets calculated for each open DA, DE, and PE case in the reporting year, the total of all assets less lien amounts on real property in each DA, DE, and PE estate where the decedent died on or after March 28, 2013, and the total inventory fees collected under MCL 600.871(1).

Report the total inventory fees collected by the court for the reporting year:

A Case No.	B Date of Death	C Total Estate Value Before Liens Deducted	D Calculated Inventory Fee Before Liens Deducted	E Total Estate Value After Liens Deducted	F Calculated Inventory Fee After Liens Deducted
<input type="checkbox"/>		\$	\$	\$	\$
Total Calculated Inventory Fees for All Cases			\$		\$

Column A: List each DA, DE, and PE case where the decedent's date of death is on or after March 28, 2013. Mark after the case number if it was reported in a previous reporting year.

Column B: For each case listed in Column A, report the date of death.

Column C: For each case listed in Column A, report the total estate value before any liens on real property have been deducted from the total value of the estate.

Column D: For each case listed in Column A, report the calculated inventory fee on the value in Column C.

Column E: For each case listed in Column A, report the total estate value after any liens on real property have been deducted from the total value of the estate.

Column F: For each case listed in Column A, report the calculated inventory fee on the value in Column E.

NOTE: The report can be generated on paper and mailed to the SCAO or to a file in a format that can be converted to PDF and e-mailed to the SCAO.

SCAO 67 (2/13) REPORT OF DECEDENT ESTATE ADMINISTRATION FEES MCL 600.871(4)

Generating SCAO 67

14. Delinquent Fiduciary Reports 29. Transaction Report - Civil
 30. Transaction Report - Probate
 31. Estate Administration Fees

Make your selection: **31**

Nxt Tran P RPT Type PRO Case# 13000123 Rec nbr ____
 F1=Help F2=Nxt Tran F3=Exit F4=Prompt F6=System
 F8=Civil F9=Name Inq. F14=Dkt. Inq F16=Inv. Cal

From the Probate Report Selection Menu (RPT PRO),

- Select option #31
 - Estate Administration Fees
- Select <Enter>

Court ID : P 19 MITTSJ Estate Administration Fees

Enter Begin Date: **0101 2014**
 MMDD CCYY

Enter End Date: **1231 2014**
 MMDD CCYY

Enter the report Begin Date and End Date

- Select <Enter>

P19 REPORT OF DECEDENT ESTATE ADMINISTRATION FEES BEGIN DTE: 01/01/2014 PAGE :
 PINVRPT COUNTY PROBATE COURT END DATE: 12/31/2014
 COURTHOUSE, 100 MAIN STREET CONTACT : JUDICIAL INFORMATIN SYSTE
 LANSING MI 48809 PHONE # : (888) 339/1547
 JUDGE CLATTERBAUGH, JAMES R

CASE NUMBER	PRY DATE OF DEATH	TOTAL ESTATE VALUE BEFORE LIENS DEDUCTED	CALCULATED INV FEE BEFORE LIENS DEDUCTED	TOTAL ESTATE VALUE AFTER LIENS DEDUCTED	CALCULATED INV FEE AFTER LIENS DEDUCTED
13000017	03/01/	70.00	5.00	50.00	5.00
13000018	02/23/	70.00	5.00	50.00	5.00
13000020	02/23/	226,123.00	520.00	150,000.00	425.00
13000021	02/23/	226,123.00			425.00
13000328	02/28/	226,123.00			425.00
13007822	02/01/	86,110.00			69.00
20130003	02/01/	26,210.00			22.00
20130008	02/02/	26,210.00			122.00
20130009	03/01/	674,633.70	988.00	654,321.12	988.00
20130011	03/15/	71,354.57	291.00	56,123.45	253.00
TOTAL CALCULATED INVENTORY FEES FOR ALL CASE			\$ 3,473.00		\$ 2,839.00

A previously reported inventory (amended inventory) will be indicated with an asterisk (*) in this column.

Submitting the Report

Submit the report by March 31st following each calendar year.

Submit the report to:

State Court Administrative Office
Trial Court Services Division
Attention Deb Marks
P.O. Box 30048
Lansing, MI 48909

e-mail to: marksd@courts.mi.gov

The report is for calendar years 2014, 2015, 2016 and 2017

Account and Price Code Requirement

For the inventory to report correctly, it is mandatory that the code of **INV** is used for both the Price Code **AND** the Account Code.

Form Change PC572

Letters of Authority have been updated to reflect the new language for the Personal Representative regarding lien.

- Where the decedent's date of death is on or after March 28, 2013, the lien amount will be deducted from the value of the real property for purposes of calculating the inventory fee under MCL 600.871(2).

Header Screen Optional Date Field

```

HEADER ADD
CASE# 13000123 TYPE __ XREF # _____ TYPE __ JUDGE _____ DATE _____
NAME _____ SSNO 0000000000 OPTIONAL DATE _____
ADDRESS _____
CITY _____ STATE __ ZIP _____ PHONE _____
STATUS Q CLOSED _____ REOPEN _____ ATTNY _____ PUBLIC P
MICRO _____ DISPO _____ CODE _____ ORIG PR _____
CSE TYPE CHG _____ FROM TYPE __ CHG VENUE IN _____ RACE __ ANCILLARY _
=====
    
```

The Optional Date field on the header screen will require a value for the following case types:

- DA, DE and PE
 - Enter the Date of Death
- CY, GM, and LG
 - Enter the Date of Birth

Cash Register Screen

```

Money Ord Amt: _____ Total due
Money order#: _____ Amount paid
Balance
Paid by _____ Print Y Enter YOUR Pass Word

Nxt Tran P ARP Type ADD Case# 13000113 Rec nbr ____
F1=Help F2=Nxt Tran F3=Exit F5=Other Pmt type F7=Restart F8=Civil F24=More
    
```

Money Ord Amt: displays when F5 Other Pmt Type is selected

Release Version

```

USER: P19MITTSJ TRANSACTION REQUEST SCREEN RELEASE: 3/2013

Probate Transactions Receivable Vendor Transactions
HDR - Case Header ARM - Mast 0 - Other Vendor Maint.
PTY - Party ARU - Mast A - Attny Vendor Maint.
SCH - Schedule CHK - Master Payment Inq APF - Facil Vendor Maint.
SUM - Summary LUP - Receipt Inquiru/Void APV - Voucher Processing
    
```

When the release is added onto your system, the date will display as 3/2013