

## **CASE ADJUDICATION/DISPOSITION AND SETTING THE QUALIFICATION/ANNIVERSARY DATE**

For proper reporting on Caseload and other reports, it is necessary that the correct disposition and fiduciary qualifications are entered correctly.

Once a petition is filed with the court, an order or registers statement is entered granting or denying the petition.

On the following pages, we will process a decedent estate and a guardianship as examples of disposition and fiduciary qualification.

## Disposition - Decedent Estate

Dispositions will be entered through the EDIT EVENT screen.

```

MITTSJ37 UCIXE1K UCSGEN Environment TEST
Edit Event 5/26/05

Crt: P 13 13 Jurist: HARTER Bond: Auth: OPEN
Case: 2002 0000000605 DE SAMUAL SMITH
Atty: Worker:
File: 10/07/2002 Dispose: Reopen: Close:

Evt: RIO Dte: 10/08/2002 Plea: ___ Dsp: GTD Pgm/Rslt: ___ Monetary: ___
Pty: HDR 1 Cnt: ___ Attny: ___ Jur: J 24309 Due Dte: ___
Cmt:
Form: ___ Register: ___ Receipt: ___ Amount: ___

Schedule Next Action:
Next: ___ Date: ___ Time: ___ Jur: ___ Ctrm: ___
Cmt:

F3=Exit F10=Name F13=Cmnds F14=More Comments F16=Calc F19=PCN F20=Bonds
    
```

**Evt:** Enter the event code for the document that disposed the case.  
The example used is RIO (Register's Order/Statement)

**Dte:** Enter the date of the disposition  
The example used is 10/08/2002

**Dsp:** Enter the disposition code (<F4> prompt for options)  
The example used is GTD (Granted)

**Pty:** Enter the party that is being disposed (Probate case type is always disposed with the header party)  
The example used is HDR 1 (Header)

**Jur:** Enter the Judge, if different from the assigned jurist of record.  
The example used is the assigned jurist of record.

**NOTE:** The **Edit Event** screen currently indicates that the case is open and the dispose date field is blank.

Once you have made the required entries, press <ENTER> and the following screen will be returned

## Disposition - Decedent Estate Continued

```
MITTSJ37 UCIXE1K UCSGEN Environment TEST
Edit Event 5/26/05

Crt: P 13 13 Jurist: HARTER Bond: Auth: ADJU
Case: 2002 000000605 DE SAMUAL SMITH
Atty: Worker:
File: 10/07/2002 Dispose: 10/08/2002 Reopen: Close:

Evt: ___ Dte: 5/26/2005 Plea: ___ Dsp: ___ Pgm/Rslt: ___ Monetary: ___
Pty: ___ Cnt: ___ Atty: ___ Jur: ___ Due Dte: ___
Cmt: ___
Form: ___ Register: ___ Receipt: ___ Amount: ___

Schedule Next Action:
Next: ___ Date: ___ Time: ___ Jur: ___ Ctrm: ___
Cmt: ___

F3=Exit F10=Name F13=Cnds F14=More Comments F16=Calc F19=PCN F20=Bonds
```

The case is now at adjudicated status and the dispose date field is populated with the event date.

Caseload count      Part 1, Section A, Line 2 New Filing for DE case type  
Part 2, Section A, Line 1 Granted for DE case type

## Setting the Qualification/Anniversary Date Decedent Estate

Courts may determine the event for setting the qualification date. A qualification date will be set by either the Letters of Authority (LET), the Acceptance of Appointment (AOA), or a bond, which are entered through the EDIT EVENT screen.

**Evt:** Enter the event code for the document that will set the qualification/anniversary date for the Personal Representative. The example used is LET (Letters of Authority)

**Dte:** Enter the date the Letters were issued. The example used is 10/08/2002

**Pty:** Enter the party that the letters are associated with. The example used is PR 1.

Once you have made the required entries, press <ENTER>.

## Setting the Qualification/Anniversary Date Decedent Estate - Continued

MITTSJ37 UCIXE1K UCSGEN Environment TEST

MITTSJ37 UCW2DFK  
Select Parties for Event  
Case: 2002 0000000605 DE SAMUAL SMITH

Type options, press Enter.  
1=Select 2=Change 5=Display C=Cases D=Dates

Party: PR \_1

Pty	Name	Disp Attorney	Anniv Dt
_ PR 1	SMITH, SARAH,		10/08/2002

F3=Exit F6=Create F17=Top F18=Bottom  
Record changed.

An arrow points from the text below to the 'Anniv Dt' field in the table above.

The qualification/anniversary date has now been set for the Personal Representative.

Reports impacted: Pre-Notices, Delinquent Fiduciary Report, Case Review, and Mailers.

## Disposition - Guardianship

**Dispositions will be entered through the EDIT EVENT screen**

```

MITTSJ37 UCIXE1K UCSGEN Environment TEST
Edit Event 5/26/05

Crt: P 13 13 Jurist: CLATTERBAUGH Bond: Auth: OPEN
Case: 2002 0000001425 GA JAMES SMITH
Atty: Worker:
File: 2/01/2002 Dispose: Reopen: Close:

Evt: DAG Dte: 02022002 Plea: Dsp: GTD Pgm/Rslt: Monetary:
Pty: HDR 1 Cnt: Attny: Jur: Due Dte:
Cmt:
Form: Register: Receipt: Amount:

Schedule Next Action:
Next: Date: Time: Jur: Ctrm:
Cmt:

F3=Exit F10=Name F13=Cmnds F14=More Comments F16=Calc F19=PCN F20=Bonds
    
```

- Evt: Enter the event code for the document that disposed the case.  
The example used is Order Appointing Guardian
  
- Dte: Enter the date of the disposition  
The example used is 02/02/2002
  
- Dsp: Enter the disposition code (<F4> prompt for options)  
The example used is GTD (Granted)
  
- Pty: Enter the party that is being disposed (Probate case type is always disposed with the header party).  
The example used is HDR 1 (Header)
  
- Jur: Enter the Judge who signed the order, if different from the assigned jurist of record.  
The example used is the jurist of record

NOTE: The Edit Event screen currently indicates that the case is open and the dispose date field is blank.

Once you have made the required entries, press <ENTER> and the following screen will be returned.

## Disposition - Guardianship Continued

MITTSJ37 UCIXE1K UCSGEN Environment TEST  
Edit Event 5/26/05

Crt: P 13 13 Jurist: CLATTERBAUGH Bond: Auth: ADJU  
Case: 2002 0000001425 GA JAMES SMITH  
Atty: Worker:  
File: 2/01/2002 Dispose: 2/02/2002 Reopen: Close:

Evt: \_\_\_ Dte: 5/26/2005 Plead: \_\_\_ Dsp: \_\_\_ Pgm/Rslt: \_\_\_ Monetary: \_\_\_  
Pty: \_\_\_ Cnt: \_\_\_ Attng: \_\_\_ Jur: \_\_\_ Due Dte: \_\_\_  
Cmt: \_\_\_  
Form: \_\_\_ Register: \_\_\_ Receipt: \_\_\_ Amount: \_\_\_

Schedule Next Action:  
Next: \_\_\_ Date: \_\_\_ Time: \_\_\_ Jur: \_\_\_ Ctrm: \_\_\_  
Cmt: \_\_\_

F3=Exit F10=Name F13=Cnds F14=More Comments F16=Calc F19=PCN F20=Bonds

The case is now at adjudicated status and the dispose date field is populated with the event date.

Caseload count      Part 1, Section D, Line 2 New Filing for GA case type  
Part 2, Section D, Line 1 Granted for GA case type

## Setting the Qualification/Anniversary Date Guardianship

Courts may determine the event for setting the qualification date. A qualification date will be set by either the Letters of Authority (LET), the Acceptance of Appointment (AOA), or a Bond, which are entered through the EDIT EVENT screen.

```

MITTSJ37 UCIXE1K UCXGEN Environment TEST
Edit Event 5/26/05

Crt: P 13 13 Jurist: CLATTERBAUGH Bond: Auth: ADJU
Case: 2002 0000001425 GA JAMES SMITH
Atty: Worker:
File: 2/01/2002 Dispose: 2/02/2002 Reopen: Close:

Evt: LET Dte: 02/02/2002 Plea: ___ Dsp: ___ Pgm/Rslt: ___ Monetary: ___
Pty: GDN 1 Cnt: ___ Attny: ___ Jur: ___ Due Dte: ___
Cmt: ___
Form: ___ Register: ___ Receipt: ___ Amount: ___

Schedule Next Action:
Next: ___ Date: ___ Time: ___ Jur: ___ Ctrm: ___
Cmt: ___

F3=Exit F10=Name F13=Cmnds F14=More Comments F16=Calc F19=PCN F20=Bonds
    
```

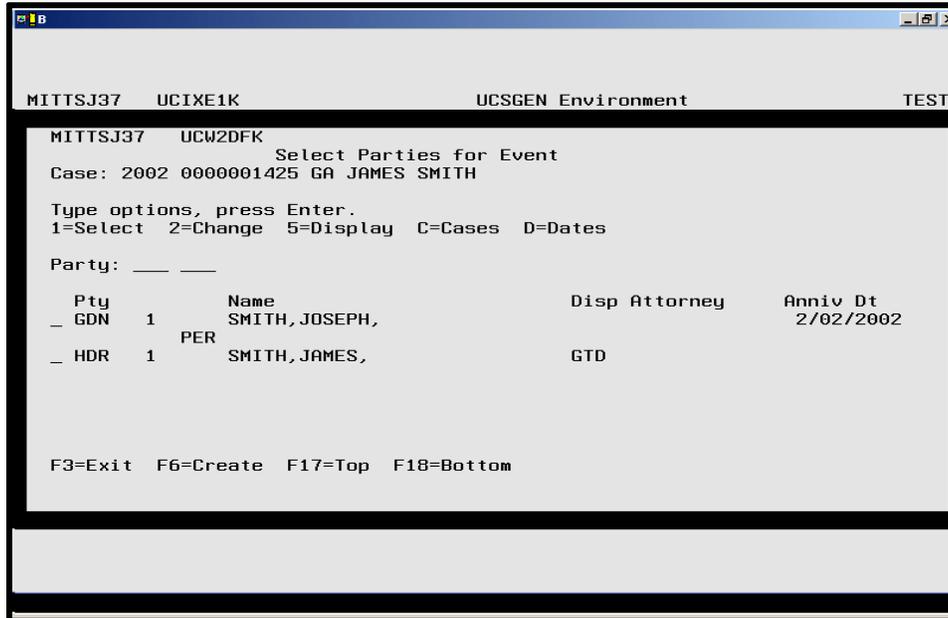
**Evt:** Enter the event for the document that will set the qualification/anniversary date for the Guardian.  
The example used is LET (Letters of Authority)

**Dte:** Enter the date the Letters were issued  
The example used is 02/02/2002

**Pty:** Enter the party that the Letters are associated with  
The example used is GDN 1

Once you have made the required entries, press <ENTER>

## Setting the Qualification/Anniversary Date Guardianship



The qualification/anniversary date has now been set for the Personal Representative

Reports impacted: Pre-Notices, Delinquent Fiduciary Report, Case Review, Mailers, Guardian Review.

