

Probate Court System December 2008 Software Release Announcement

STATE COURT ADMINISTRATIVE OFFICE
JUDICIAL INFORMATION SYSTEMS

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Pilot Courts: Allegan and Kalamazoo

Probate

Caseload

The Probate Caseload Report will now track and count **case type changes** on caseload. If you have a case type change **prior to disposition**, you will need to update the header under the “CSE TYPE CHG” field. Then you may change your “TYPE” and add your disposition. Caseload will count the original case type and the disposition for that filing will be “Case Type Change”. You will also get a count for the new case type and a count for the disposition. Therefore, you will have two new filings and two dispositions for that case. As an example, petitioner files a Petition for Guardianship of LII (GA). At the hearing, the judge grants a Limited Guardianship (GL). You will have (1) count for GA; (1) disposition of case type change; (1) count for GL; and (1) count of granted. It is important to note that the case type change must be done prior to adding the disposition. Also, the GA case will appear as a “Out of System” in Part 2 - Section D, line 8, and the GL case will appear in Part 1 – Section D, line 4 as an active “Guardianship in System”.

Case Modify Screen:

HEADER MOD
CASE# 20070001 TYPE GA XREF # _____ TYPE __ JUDGE 123 DATE 8011997
NAME WENN, TAMMY, SSNO 000000000 OPTIONAL DATE _____
ADDRESS _____
CITY _____ STATE __ ZIP _____ PHONE _____
STATUS 0 REOPEN _____ ATTNY _____ PUBLIC P
MICRO _____ DISPO _____ CODE _____ ORIG PR _____
CSE TYPE CHG _____ FROM TYPE _____ CHG VENUE _____ RACE _____ ANCILLARY _____

Screen Format:

The caseload Report screen has also been modified. We have populated the fields with X's; rather than your selection of "Y's" or "N's". This change was made to keep the Juvenile and Probate Caseload screen consistent with each application.

The **old** screen appeared as:

```
Court ID : P 83 SCA0      Caseload Report Selection

      (NOTE: Leave quarter blank for full year)

QUARTER: _ YEAR: ____ -OR- DATE: ____ - ____
          MMDD CCYY      MMDD CCYY
GENERATING UPLOAD FILE? Y (Y/N)

PART 1: _ (Y/N)  AUDIT REPORT: _ (Y/N)
PART 2: _ (Y/N)  AUDIT REPORT: _ (Y/N)
PART 4: _ (Y/N)  AUDIT REPORT: _ (Y/N)  PART 4 % REPORT: _ (Y/N)

Nxt Tran P RPT Type PRO Case# 00000000      Rec nbr ____
F1=Help F2=Nxt Tran F3=Exit F4=Prompt      F6=System
F8=Civil F9=Name Inq.      F14=Dkt.Inq F16=Inv.Cal
```

The **new** screen now appears as:

```
Court ID : P 19 TAMMY      Caseload Report Selection

      (NOTE: Leave quarter blank for full year)

QUARTER: _ YEAR: 2008 -OR- DATE: ____ - ____
          MMDD CCYY      MMDD CCYY
CREATE UPLOAD FILE? X

SELECT JUDGE: ____ (Enter Bar # for specific judge..BLANK FOR ALL)

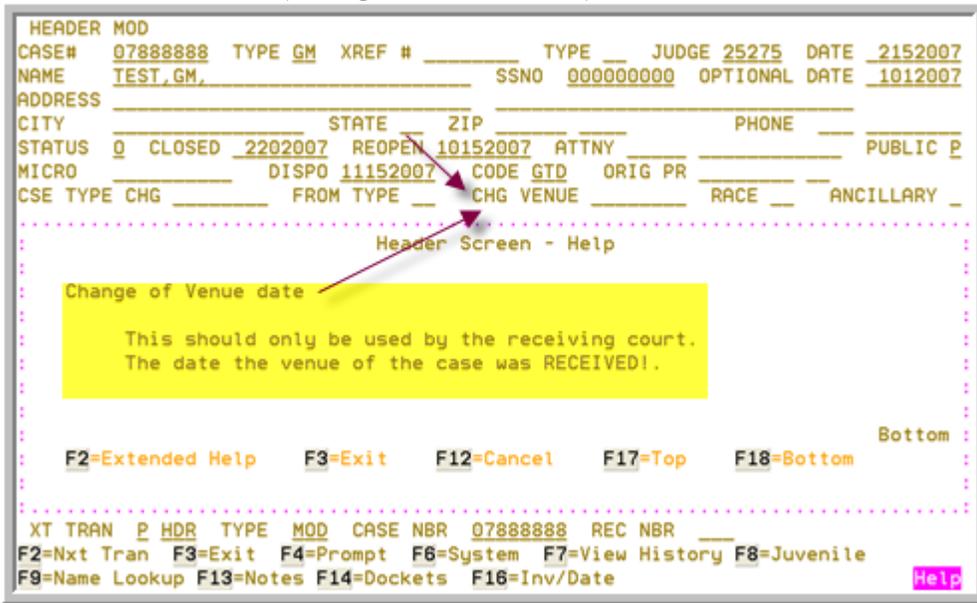
PART 1: X  AUDIT REPORT: X
PART 2: X  AUDIT REPORT: X
Part 3: _  AUDIT REPORT: _ (FUTURE USE)
PART 4: X  AUDIT REPORT: X  PART 4 % REPORT: _

Nxt Tran P RPT Type PRO Case# 04017562      Rec nbr ____
F1=Help F2=Nxt Tran F3=Exit F4=Prompt      F6=System
F8=Civil F9=Name Inq.      F14=Dkt.Inq F16=Inv.Cal
```

Change of Venue Field

Reminder that the Change of Venue field is to be completed by the “receiving” court only. This field may affect your numbers for caseload reporting if the originating court completes this field. This field is not designed for the originating court to show that they are changing venue to another court. If the Change of Venue field has been completed, the system will not pick up the case as a new filing or pick up the disposition for caseload reporting.

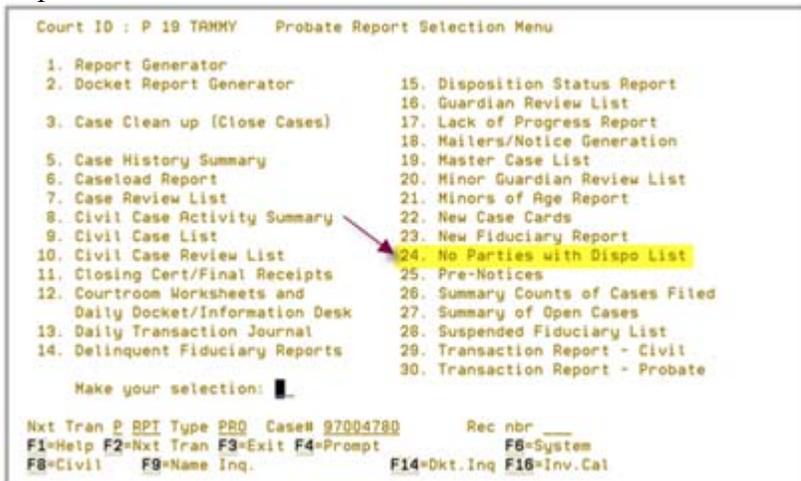
Header MOD Screen (Change of Venue Field):



New Probate Report

We have created a new Probate Report which will show all cases which have a disposition, however, no parties. This is Report No. 24 – No Parties with Dispo List. This Report will list the Case Number, Case Type, Case Name, Disposition Date, and Disposition Type.

Report Selection Screen:



Example of the Report:

CASE #	TYPE	CASE NAME	DISP DATE	DISP TYPE
00024413	NC	NAME CHANGES FOR 2000,,	12/31/2001	CVT
01024626	NC	NAME CHANGES FOR 2001,,	12/31/2001	OAH
01024677	TT	WEBER, DALE K,	12/31/2001	CVT

Disposition and Disposition Date Fields

We have tightened the disposition and disposition date fields on the header screen which will now require you to add the party prior to updating the header with the disposition. This feature was added to avoid the issue of not entering parties to your cases after appointment. As you are aware, if parties have not been entered onto the party screen, the cases will not appear on subsequent reports (delinquent fiduciary, mailers and pre-notices).

```

HEADER ADD
CASE# 20081249 TYPE GA XREF # _____ TYPE __ JUDGE 123 DATE 10012008
NAME JONES, JOHN _____ SSNO 00000000 OPTIONAL DATE _____
ADDRESS 123 WEST MAIN STREET _____
CITY LANSING _____ STATE MI ZIP 48909 _____ PHONE 517 111-2222
STATUS 0 CLOSED _____ REOPEN _____ ATTN _____ PUBLIC P
MICRO _____ DISPO 10002008 CODE GTD ORIG PR _____
CSE TYPE CHG _____ FROM TYPE _____ CHG VENUE _____ RACE _____ ANCILLARY _____
=====
No party found, enter party before dispo
NXT TRAN P HDR TYPE ADD CASE NBR 20081249 REC NBR 1
F2=Nxt Tran F3=Exit F4=Prompt F6=System F8=Juvenile
F9=Name Lookup F13=Notes F14=Dockets F16=Inv/Date Help

```

Forms

- The following forms will be updated for the most recent SCAO revisions:
 - PC600 – Notice of Deficiency
 - PC632 – Order Regarding Appointment of Temporary Guardian of Incapacitated Individual
 - PC645 – Letters of Conservatorship
 - PC653 – Order Regarding Appointment of Guardian/Limited Guardian of Minor
 - PC660 – Order Appointing Guardian for Individual with Developmental Disability
 - PCA323 – Advice of Rights after Order Terminating Parental Rights
 - MC28 – Notice to Prior Court of Proceedings Affecting Minor(s)

New Probate Forms

- PC638 – Petition to Terminate or Modify Guardianship/Conservatorship has been **DELETED**. Three new Probate forms have been added to replace that form.

- PC675 – Petition to Terminate/Modify Guardianship (**JIS Code of PTG**)
- PC676 – Petition to Terminate/Modify Conservatorship (**JIS Code of PMC**)
- PC677 – Petition to Terminate/Modify Guardian for Alleged Developmentally Disabled Individual (**JIS Code of PTD**).

Please make a note of these new JIS Codes for each form.]

Name Index

We have added a feature to modify names which you have added to the Name Index by using the F10 option. However, if you want to modify the name, it will be necessary to type in the Case #, Type, Desc, and Name exactly as the original entry. To get to the modification screen, press the F10 – Name Update key and place MOD after Name command (ADD is defaulted in this space, therefore, it will be necessary to type “MOD” over “ADD”).

Example of F10 – Name Update – Modify Screen:

CASE #	TYPE	DESC	NAME	NUM	DATE FILED	MICROFILMH
00000001	HL	OTH	TAMMY L. WENN,,			

Juvenile

Event Codes of ATP vs ATT (Order Appointing Attorney vs Appearance of Attorney)

The functionality of event codes ATP and ATT have been modified. If you enter the code of ATP (Order Appointing Attorney/LGAL) and then that appointed attorney files their Appearance (ATT), currently, the system would change the appointment status to “Retained”. However, with the changes on the Release, the appointment status will not change. So now you may enter your ATP, and upon receipt of the Attorney’s Appearance, enter your ATT event, the status will remain as “Appointed”. However, if there is an ATT event added and there is no attorney information populated for that party, the system will automatically place an “R” in the appointment field for “Retained”.

CTN and Complaint Numbers

We have modified the petition screen and prefilled the CTN and Complaint Number fields with zero’s. As you enter new petitions to the system, you can field exit through the zero’s and type in your numbers and the system will insert enough zero’s to fill those fields. It is very important that your CTN number that you enter is a 12 digit number as the system will not place zero’s in front of the numbers you have entered to make the numbers a 12 digit number. Therefore, if you enter a CTN number which only contains 11 digits, we will place a zero in front of your number, thus your CTN number will not start out with your county number.

```

Petition ADD Case# 97004780 __ Petition# 00000001 Type DL Filed 0128 1997
Jurist 31194 Attorney _____ Type _ Worker 97701 Public P
Name TACOMA Name _____ Name _____ SSN 000000000
Name TEST,ERIC,LEE DOB 309 1982 Gen M Race _
Petition Opened _____ Jurist _____ Adjud _____ Jurist _____ Code _____
Petn Authorized _____ Jurist _____ Paper Plate _____
Offense Date _____ Loc _____ Petitrn _____ CTN 000000000000 Cmp 000000000000
Reopen Date _____ Service Type _ Destroy Date _____

```

```

Petition MOD Case# 97004780 __ Petition# 00000003 Type DL Filed 0128 1997
Jurist 31194 Attorney _____ Type _ Worker 97701 Public P
Name TACOMA Name _____ Name _____ SSN 000000000
Name TEST/ERIC/LEE DOB 309 1982 Gen M Race _
Petition Opened 1031 2008 Jurist 123 Adjud _____ Jurist _____ Code _____
Petn Authorized 1031 2008 Jurist 123 Paper Plate _____
Offense Date _____ Loc _____ Petitrn CCS CTN 830412356123 Cmp 000000000123
Reopen Date _____ Service Type _ Destroy Date 309 2012

```

```

Petition MOD Case# 97004780 __ Petition# 00000001
Jurist 31194 Attorney _____ Type _ Worker 97701
Name TACOMA Name _____ Name _____
Name TEST/ERIC/LEE DOB 309
Petition Opened 1031 2008 Jurist 123 Adjud
Petn Authorized 1031 2008 Jurist 123 Paper Plate
Offense Date _____ Loc _____ Petitrn CCS CTN 083041235612 Cmp 000000000123
Reopen Date _____ Service Type _ Destroy Date 309 2012

```

Notice the leading zero's as I entered an 11-digit CTN No. and a 3-digit Complaint No.

Forms

- The following forms have been updated for the most recent SCAO revisions.

- JC05a – Order to Apprehend and Detain (Delinquency Proceedings/Minor Personal Protection)
- JC14a – Order of Disposition, In-Home (Delinquency Proceedings)
- JC59 – Order of Adjudication (Delinquency Proceedings)
- JC74 – Order of Probation (Designated Case)

MC28 – Notice to Prior Court of Proceedings Affecting Minor(s)

- The following forms have been added to the system:

- JC31 – Authorization for Return of Bond
- JC33 – Motion & Order to Destroy Files
- MC229 – Motion, Affidavit, and Bench Warrant

Probate and Juvenile Systems

Court Reporter/Recorder Field – reminder that if you have included your expiration date in the Court Reporter Details setup, after the expiration date, you will not be able to select that reporter/recorder. If you are using this to track expiration dates, it is necessary that you modify the Court Report Detail screen annually. If you are not relying on this field to keep track of expiration dates, it is not necessary to place the expiration date on the Detail screen.

Court Report Details Screen:

MODIFY Court Reporter Details

Cert No. : 8954 Certification: CER
Last Name : WENN
First & MI: TAMMY Name Sfx: _____
RDR Text : TAMMY WENN, #8954 CER
Address: 925 WEST OTTAWA STREET
P.O. BOX 3004B
Company: JIS
Telephone: 517 373 7821 Ext. _____
FAX: _____
E-Mail: _____
Exp. Date: _____
Last Chgd: 10/30/2007 Chg by: J19TAMMY

HELP F3=Exit Enter=Update

Financial

- We have omitted all financial orders dated prior to 1996 which have not had any payments since 1996 from the Outstanding Receivables Report.
- Due to negative numbers appearing on the Outstanding Receivables Report, it was necessary to make some changes to the financial order functions. They are as follows:
 - When adding new financial orders to cases, you are no longer able to enter a dollar amount in the “Order Amount” field without a frequency. The “Order Amount” field should only be used when a frequency (daily, weekly, month, etc) has been ordered.
 - When adding new financial orders to cases, you can no longer enter both a “Total Order Amount” and an “End Date” when you have selected a frequency payment method. The only time you should enter an “End Date” is when you have an order with a frequency.
 - You are able to space through an error entered on a financial order at the FRD MOD screen, however, all modifications will generate an audit record.
 - You are no longer able to modify a financial order from one price code to another price code.
 - We have created a report which will show all billing statements which have been flagged to suppress the bills from printing when bills are generated. This is Report No. 33.
 - DSS 207 Report has been modified to add the new reporting requirements to track and report out-of-state placements. DHS has revised the Report to add more specificity to the number and cost of youths placed outside the State of Michigan. Effective on the October 207 Report for fiscal year 2008/2009, this change will need to be reported on the new form. Previously, out-of-state placements were reported on line 38 of the 207 Report. New lines have been added to the 207 Report which will make it more clear as to what type of out-of-state placement youths have been Court ordered.
- We have added the option to run the A/R Balances Report for Inactive Accounts. Also, the DOB field has been fixed on this Report.

A/R Balances Report:

```

Court ID : J 19 TRMV          A/R Balances Report
      MMDD CCYY
Enter the cutoff date      1028 2008

Enter case type, or leave blank for ALL    _ (DL/DJ/NA/TL)

Enter price code, or leave blank for ALL    _

Enter case worker #, or leave blank for ALL _

Enter judge code, or leave blank for ALL    _

Enter "Y" for active accounts only, Y (Y/N/I)
For inactive accounts or blank for ALL

Enter "Y" to print the account details      Y (Y/N)

Enter "X" to print in case name sequence
and leave blank to print in case # sequence _

Next Tran  RPT Type  EIN  Case#  87004780  _  Patn#  87047808  Event#  38  Party  _
F1=Help F2=Next Tran F3=Exit F4=Prompt          F8=System
F9=Probate F9=Name Inq.          F14=Dkt. Inq F16=Inv. Cal
  
```

- We have added the check numbers to the List of Voucher Numbers Report (Report No. 2).

List of Voucher Numbers Report:

VOUCHER LIST		FROM DATE	1/01/2000 TO DATE	10/24/2008	DOLLAR AMT	CHECK NUMBER
DOC. NUMBER	VENDOR NAME	DOC. DATE				
000000363	BAPTIST FAMILY SERVICES	1/09/2008			379.20	
000000364	SONHLD,	1/09/2008			25.00	
000000365	BILLY VICTIM//	1/09/2008			100.00	
000000366	BILLY VICTIM//	1/09/2008			150.00	
000000367	NELLY VICTIM,,	2/22/2008			100.00	
000000368	MENN, TAMMY,	8/18/2008			20.00	
000000369	BILLY VICTIM//	8/26/2008			33.00	
000000370	ROTER, VIC, TIM	7/01/2008			30.00	
000000371	BAPTIST FAMILY SERVICES	7/22/2008			400.00	12345
000000372	ROTER, VIC, TIM	7/22/2008			30.00	1940
000000373	TROYIS BRON,,	8/19/2008			45.50	04P1101
000000374	BAPTIST FAMILY SERVICES	10/02/2008			5505.00	
000000375	AREA YOUTH FOR CHRIST	10/08/2008			700.00	1238ET
000000376	BETHANY CHRISTIAN SERVICES	10/09/2008			973.35	WED958

Future Enhancements

Judicial Information Systems (JIS) and the State Court Administrative Office are devoting a great deal of time and energy to designing and building the Next Generation case management system. JIS will continue its commitment to providing outstanding service and support to the courts that currently use JIS. Due to this project, PCS enhancements will be limited to fixes, form changes, and legislative changes.

Updates regarding NGJIS can be found on the JIS website, courts.mi.gov/jis. Please contact JIS if you have any questions.