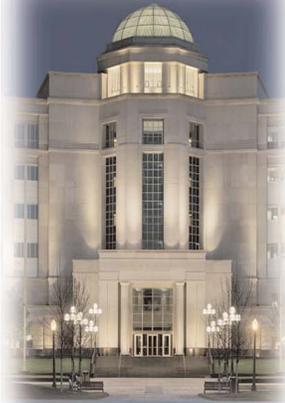


Judicial Information Systems

Trial Court System 2013 Probate Inventory Fee

Contact: Technical Service Representatives
Susan Svoboda, Michele Cox, Nora Edwards, Teresa Kinter



Help Desk Phone:

888-339-1547

Option 4:

TCS Help Desk
(Software questions)

Option 5:

Operations
(Hardware)

Help Desk Fax:

517-373-7451

Help Desk E-mail:

**tcshelpdesk
@courts.mi.gov**

JIS Website:

www.courts.mi.gov/jis
(click on Court
Systems to find TCS
link)

Beginning March 28, 2013, courts shall deduct a lien on real property from the value of the estate. This applies only to estates where the decedent died on or after March 28, 2013. Two calculations shall be used by the courts, depending on a decedent's 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.

Below is the link to the memorandum dated January 17, 2013 which outlines the changes.

<http://courts.mi.gov/Administration/SCAO/Documents/Family-Probate/2012PA596.pdf>

Change Splits for Inventory Fees

Effective March 28, 2013, the distribution formula will be changed for **all** fees collected. All inventory fees received by the Probate Court shall be paid as follows:

- (a) until December 31, 2017, 47.5% of each fee shall be paid to the county treasurer and credited to the county general fund. Beginning January 1, 2018, 40% of each fee shall be paid to the county treasurer and credited to the county general fund.
- (b) until December 31, 2017, 52.5% of each fee shall be paid to the state treasurer and credited to the state general fund. Beginning January 1, 2018, 60% of each fee shall be paid to the state treasurer and credited to the state general fund.

Below are the instructions on how to create a new price detail / split inventory cash code.

Edit Price/Details for Inventory Fees

On the Next Line type **FCC**. <enter>

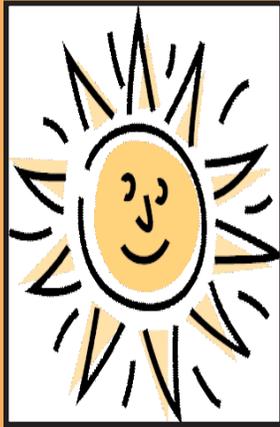
Type in the cash code for the Inventory Fee (for example: INV or INVF) on the Code: line. <enter>

Select Option P for Price Details on the line beside the cash code. <enter>

```

Type options, press Enter.
2=Change 5=Display 4=Delete P=Price

Code: INV
Code Description          Paydwn AUD      Report Typ Full Allo
Seq#  SUM           /Event  Pay  Non$
P INV  INVENTORY FEES    10  GENL R  I Inventory  Y  N
    
```



At this point, it is suggested that a print screen be done to ensure that the correct account numbers are being added. Select Option 5 next to the most current effective date to display the price details. Print this screen.

At the Work with Price screen, select option F6 to create new price details. Enter the information shown below.

```

MICHELE   UCXBETK                               UCSGEN - TEST                               HOJ
                                                Edit Price/Price Details                               3/06/13

  Court: P 13 13
  Cash Code: INV

  Eff Date: 03282013
  Cash Type: P (A/P)                               Amt/Pct: 100.00  Victim Assessment: _
  .00 Calc Total                                     Please Note: The account numbers may vary based on the
                                                    account your Court uses.

  Amt/Pct  Fun Act Acc Sub                               FORWARD Col DHS
                               Acc                               Col Col Typ 207
  47.50    101 000 621 000                               - - -
  52.50    701 006 228 000                               - - -

  Type in the information stated above under
  Amt/Pct. F4 prompt on the account number and
  select the same account number from the
  previous price screen.

  Alternate Account:
  Alternate Account:
  Alternate Account:
  Alternate Account:

  F3=Exit  F10=Name  F13=Cmnds  F16=Calc  F23=Cancel Cash Details
    
```

- Effective Date: 3/28/2013 (no spaces)
- Cash Type: P (for Percentage) **Amt/Pct: 100%**
- Amt/Pct: 47.50. F4 prompt on the account number to select the correct account.
- Amt/Pct: 52.50. F4 prompt on the account number to select the correct account.
- Select <enter>
- Select <enter> again to confirm.

Please contact the TCS Helpdesk if you need further assistance.

Letters of Authority/Petition and Order for Assignment

Letters of Authority (PC572) have been revised to include a note on the back of the form advising the personal representative that, where the date of death is on or after March 28, 2013, the lien amount on any real property will be deducted when calculating the inventory fee. This form has been updated in the TCS system.



The Petition and Order for Assignment (PC 556) has been revised to allow the petitioner to deduct a lien amount from real property so that the court can calculate the proper inventory fee. This form is available on the SCAO website.

<http://courts.mi.gov/Administration/SCAO/Forms/courtforms/estatetrusts/pc556.pdf>

The Report of Decedent's Estate Administration Fee (SCAO 67) and instructions for collecting data from the probate courts under MCL 600.871(4) is still being finalized and will be available in the TCS system in the fall release. It is important that courts start to enter the events as of 3/28/2013 in order to properly collect the data for the 2014 report.

<http://courts.mi.gov/Administration/SCAO/Forms/courtforms/scao/scao67.pdf>

What's New: On DA, DE and PE case types

- Enter Inventory Events as usual but the court's shall now deduct the lien amount (if applicable) in order to calculate the fee.
- If a Lien amount is deducted, add a LIEN event that includes the amount.
- Display Case Screen shows the inventories before and after lien.



ALERT:

PE cases are now required to enter inventory and Lien Events.

~Important Notes~

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

For All DA,
DE and PE
case types:

Entering events in TCS:

Step 1: Enter the inventory value EXCLUDING real property to determine the inventory fee. Events: INVV, INVV or INVZ

MICHELE	UCIXE1K	UCSGEN - TEST	HOJ
		Edit Event	3/08/13
Crt: P 13	13 Jurist: HOORT	Bond:	Auth: OPEN Pub
Case: 2012 0000013571 DE	HELEN TLUCZEK		
Atty:	Worker:		
File: 5/22/2011	Dispose:	Reopen:	Close:
Evt: INVV	Dte: <u>5/22/2011</u>	Plea: ___	Dsp: ___ Pgm/Rslt: ___ Monetary: _
Pty: <u>PR</u>	<u>1</u>	Cnt: ___	Atty: ___ Jur: <u>J 28492</u> Due Dte: ___
		Suppress: Case: _	Party: _ Mic#: ___
Cmt: <u>The amount is total estate MINUS the lien amount on real property.</u>			
Form: ___	Register: ___	Receipt: ___	Amount: <u>200000.00</u>

Step 2: If a lien for real property exists, enter LIEN event. If no lien amount exists, omit event.

MICHELE	UCIXE1K	UCSGEN - TEST	HOJ
		Edit Event	3/13/13
Crt: P 13	13 Jurist: HOORT	Bond:	Auth: OPEN Pub
Case: 2012 0000013571 DE	HELEN TLUCZEK		
Atty:	Worker:		
File: 5/22/2011	Dispose:	Reopen:	Close:
Evt: LIEN	Dte: <u>5/22/2011</u>	Plea: ___	Dsp: ___ Pgm/Rslt: ___ Monetary: _
Pty: <u>PR</u>	<u>1</u>	Cnt: ___	Atty: ___ Jur: <u>J 28492</u> Due Dte: ___
		Suppress: Case: _	Party: _ Mic#: ___
Cmt: <u>The lien amount on the real property</u>			
Form: ___	Register: ___	Receipt: ___	Amount: <u>75000.00</u>

NOTE: LIEN
is a new
event

Courts can view inventory and inventory fee information on Display Civil/Probate Case screen. To view: select 5 (display) on work with cases screen.

MICHELE	UCKVD1K	UCSGEN - TEST	H0J
Display Civil/Probate Case			3/08/13
Case: 2012 0000013571 DE		OPEN	
HELEN TLUCZEK			
Jurist: J 28492 HOORT, DAVID A.,			
Filed Date: 5/22/2011 Ancillary:			
Disposed:		Reopened: Closed:	
Service Type: V INV VALUE		Probate Type: T TESTATE	
Public: P Caseload Omit: N Prison Case:			
			TCN:
Referee:			
Prosecutor: A			
Microfilm No:	Inventory:	200000.00	Fee: 488.00
X-Reference:	Inv Amt w/Lien:	275000.00	Fee: 581.00
Lower Court: 0	Jury Demand Filed:		
F3=Exit F10=Name F11=Delete F13=Cmnds F16=Calc F18=Age			

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	B	C	D	E	F
Case No.	Date of Death	Total Estate Value Before Liens Deducted	Calculated Inventory Fee Before Liens Deducted	Total Estate Value After Liens Deducted	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.