

Guardianship Tracking System

Register of Wills/Clerk of Orphans' Court Association

Lunch & Learn Meeting
April 21, 2026

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Agenda

- Statewide Guardianship Statistics
- Guardianship Tracking System Updates
- Upcoming Training



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Statewide Guardianship Statistics

- Open guardianship cases: 20,811
 - Adjudicated cases: 20,024
 - Pending cases: 787
- Assets under court supervision: \$2.379 billion
 - 18,752 Estate guardianships
- E-filed Reports: 89%
 - 33,291 of 37,529 reports e-filed

* Data as of February 15, 2026



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Statewide Guardianship Statistics

Incapacitated Person (IP) Attorney Representation

- IP representation: Final Decree – Appointments; Denied & Less Restrictive case actions
- Number of Adjudications: 2,591
 - Incapacitated Person Represented: 2,227 (86%)
 - Attorney Court Appointed: 1,967 (82%)
 - Attorney Paid by Estate: 75 (3.1%)
- Cases with Active Attorney Representation: 150
- Overall IP representation: 92%

* Data collection for February 1, 2025 – February 1, 2026



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Statewide Guardianship Statistics

- Family/Lay Guardians: 21,471
- Professional Guardians: 351
 - Organizations: 214
 - Persons: 137
- Professional 'Person' Guardians Without Active Certification
 - Persons: 84

* Data as of February 1, 2026



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Guardian Identifier Data Statistics


GTS Registered Guardians

- Registered Appointed Guardians: 11,251 *
- 84% data collection rate
 - Date of Birth: 9,532
 - Social Security Number: 9,484
 - Drivers License Number: 9,382

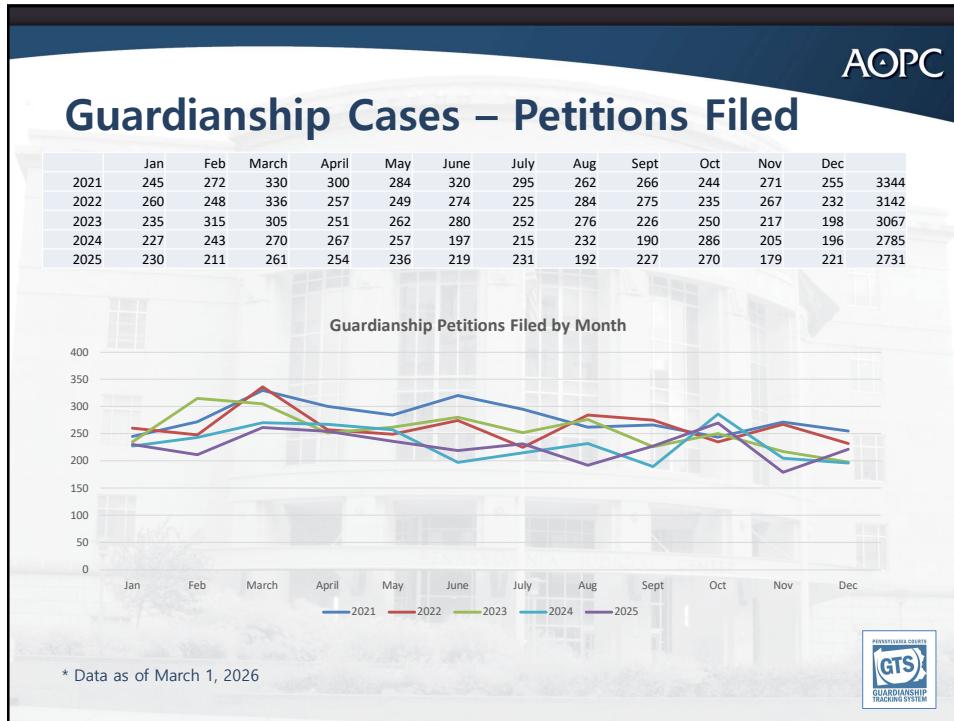
GTS Non-registered 'Person' Guardians

- Non-registered Appointed Guardians: 10,220
- Cases with Non-registered 'Person' Guardians: 3,502
- Cases with Non-registered 'Person' Guardians with Attorney Representation: 1,468

* Appointed (non-attorney) guardians as of March 1, 2026



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Amended Report Checkbox

- Amended report checkbox added to Person & Estate reports
- Facilitates identifying amended reports
- Read-only checkbox automatically populated

GTS - Report of Guardian of the Estate

COURT OF COMMON PLEAS OF
BUTLER COUNTY, PENNSYLVANIA
ORPHANS' COURT DIVISION

Report of Guardian of the Estate
Estate of Black, Carol A, an Incapacitated Person
Date of Birth: 4/2/1944
Case File No. 2022-04141
DATE COURT APPOINTED YOU AS GUARDIAN: 1/1/2023

PART I. INTRODUCTION

Amended Report:

1. Guardian Name(s)
Guardian Name(s): BUTLER COUNTY AREA AGENCY ON AGING

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Mark a Report As Reviewed


- Mark as Reviewed radio button added to the Flag Review screen
- Provides an alternative workflow for report processing
- Facilitates completing the flag review process without needing to access the Report Details screen

I, the Guardian of the Estate, I further acknowledge the Notice of Filing must be served within 10 days of the filing of this report pursuant to Pa.R.O.C.P. 14.8(b). Service shall be in accordance with Pa.R.O.C.P. 4.3.

Next Action: Close **Mark as Reviewed**

Mark as Reviewed Comments:

(500 characters remaining)




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Expanded Tracking for IP Representation

Incapacitated Person Represented at Hearing Updates

- IP Represented field added to the following case actions:
 - Incapacitated Person Deceased Prior to Final Decree
 - Order – Petition Dismissed
 - Petition for Adjudication of Incapacity Withdrawn
- Requires a 'YES' response when attorney representation is recorded in GTS
- Provides more reliable statistics on Act 61, Rule 14.8 requiring IP representation




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ACL 2025 Grant Initiative

Guardianship to Criminal Database Comparison

- Industry-first solution empowering courts to make informed decision on guardian appointments
- July 13, 2025 Go-live in GTS
- Recurring process to interrogate CPCMS and MDJS (CMS) cases and principal participants
- Types of Case Management System (CMS) cases eligible for matching:
 - Criminal
 - Non-Traffic/Summary
 - Civil
 - Landlord Tenant
 - Miscellaneous



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Guardianship to Criminal Database Comparison

Participant Match Notifications

- Automated notification & email sent to court users
- Notification generated for Agency Personnel & Appointed Guardians

GTS-CMS Participant Match Found

Participant Name: Rostas, Malin
Guardian Number: 1314858

Participant and/or guardian agency is active on the following case(s):

County	Case File Number(s)
Bradford	2026-002

Participant MDJS/CPCMS Match(es):

County	Court Office	Docket Number	Short Caption	Display Name	Participant Role	Case Disposition	Limited Access Case	Initial Match Date	Removal Date
Adams	CP-51-01-Crim	CP-01-CR-0001261-2025	Comm. v. Rostas, Malin	Rostas, Malin	Defendant	Guilty Plea - Negotiated	Yes	1/21/2026 8:01:02 PM	
Adams	CP-51-01-Crim	CP-01-CR-0001393-2025	Comm. v. Rostas, Malin	Rostas, Malin	Defendant		No	1/21/2026 8:01:02 PM	
Adams	MDJ-51-3-04	MI-51304-CR-0000120-2023	Comm. v. Rostas, Malin	Rostas, Malin	Defendant	Waived for Court	No	1/21/2026 8:01:08 PM	

For more information about Limited Access, [click here](#)

View your notifications here: [US Portal Notifications](#)

This notification was generated at Thursday, January 22, 2026 6:00 AM.



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Guardianship to Criminal Database Comparison

Participant Match – Limited Access Case

- Limited Access Case hyperlink added to notification
- Limited Access column added to CMS Matches tab

Limited Access

Pennsylvania's Clean State law, 18 Pa.C.S. § 1901 et seq., establishes a record-sealing mechanism that applies to certain criminal cases or offenses after a specified period of time has passed without additional disqualifying activity. Depending on the type of case and statutory eligibility, Clean State sealing may occur automatically or as the result of a petition filed by an eligible individual. When a case qualifies for Clean State, it is designated in court case management systems as a limited access case or offense.

A limited access case remains part of the official court record and continues to exist within court case management systems, however, access to the case is restricted. Limited access cases are not publicly accessible and are excluded from public consumption, including case searches and docket transcripts. Limited access can also apply to specific offenses on a case. When only certain offenses within a case are designated as limited access, the case remains publicly accessible, but the limited access offenses are suppressed from public access and public-facing docket information. Access to limited access cases or offenses is limited to the courts, the parties to the litigation, and criminal justice agencies.

Because Clean State eligibility is based on the passage of time following disposition and the absence of subsequent disqualifying activity, a case or offense may be updated to limited access status at any point after disposition. As a result, a case that was previously fully accessible to the public may later transition to limited access status without additional court action beyond the sealing process itself.

Accordingly, when a court user is notified that a limited access case or offense has been identified as a valid match for GTS guardian participants, this indicates that a valid participant match exists in the system, but that the underlying CMS case is subject to Clean State access restrictions.

Edit Person/Organization

Participant Information

Name	Address	Email	Phone Number
Rostas, Malin	18703 Route 907 Troy, PA 19422 (Home)		


Names
Addresses
Phone
Email
Attributes
Guardian Details
Attorney Details
Alerts

For more information about Limited Access, click [here](#).

Participant System	County	Case/Offense	Case/Offense Number	Court Location	Role/Name	Participant Role	Lead Offense	Lead Offense Description	Case Disposition	Limited Access	Initial Match Date
Hepburn/Deed	Adams	MS-51-3-04	MS-51304-CR-000120-2023	Carm. v. Rostas, Malin	Rostas, Malin	Defendant	18 § 3502 §§ A2	Burglary - Overnight Accommodation, No Person Present	Waived for Court		01/21/2026 08:01 PM
Common Pleas	Adams	CP-51-01-Crim	CP-01-CR-0001261-2025	Carm. v. Rostas, Malin	Rostas, Malin	Defendant	18 § 3502 §§ A2	Burglary - Overnight Accommodation, No Person Present	Guilty Plea - Negotiated		01/23/2026 08:02 PM
Common Pleas	Adams	CP-51-01-Crim	CP-01-CR-0001393-2025	Carm. v. Rostas, Malin	Rostas, Malin	Defendant	18 § 3621 §§ A	Theft By Unlawful Taking-Movable Prop.		✓	01/23/2026 08:02 PM

CMS Matches

Audit Information
Judicial Authority




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MDJS/CPCMS Participant Match Report

- Search for Participant Matches
 - Match Date Range
 - Participant Name, DOB, SSN, and DLN
- County-specific for GTS court users


The Unified JUDICIAL SYSTEM of PENNSYLVANIA WEB PORTAL
Bradford County Orphans' Court
MDJS/CPCMS Participant Match Report

Guardianship Tracking System

Case File No.	Case Status	Guardian Domain	Appointment Date	Judicial Authority
Participant: Rostas, Malin (1314858)				
2026-002	Adjudicated Incapacitated	Estate	01/21/2026	
2026-002	Adjudicated Incapacitated	Person	01/21/2026	
Match Date				
County				
01/23/2026				
Adams				
	Docket Number	Participant Name	Lead Offense Description	Case Disposition
	Court Office	Participant Role		Limited Access Case
01/23/2026	CP-01-CR-0001393-2025	Rostas, Malin	18 § 3502 §§ A2	Guilty Plea - Negotiated
Adams	CP-51-01-Crim	Defendant	Burglary - Overnight Accommodation, No Person Present	Yes
01/23/2026	CP-01-CR-0001393-2025	Rostas, Malin	18 § 3621 §§ A	No
Adams	CP-51-01-Crim	Defendant	Theft By Unlawful Taking-Movable Prop.	No
01/21/2026	MS-51304-CR-000120-2023	Rostas, Malin	18 § 3502 §§ A2	Waived for Court
Adams	MDJ-51-3-04	Defendant	Burglary - Overnight Accommodation, No Person Present	No

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Guardianship to Criminal Match Metrics

- GTS Participant Match statistics
 - 828 guardians with a CMS match
 - 27 professional guardians with a CMS match
 - 1,794 GTS cases with guardians matched to CMS cases
- Common Pleas Case Management System (CPCMS)
 - 728 Criminal cases
 - 13 Summary cases
- Magisterial District Justice System (MDJS)
 - 431 Non-Traffic cases
 - 386 Criminal cases
 - 261 Civil/Landlord Tenant cases
- Top Lead Offense: 75 §3802 §§A1* DUI – 1st offense

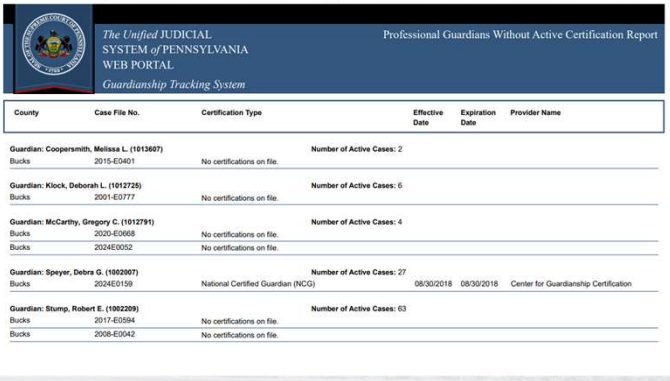



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Uncertified Professional Guardians Report

- Act 61, Rule 14.6(c) guardian certification
- Identifies appointed professional guardians with missing national certification
- County or Statewide option






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GTS Enhancement Requests

Enhancement Requests Completed since Summer 2025 Conference meeting

1. New ad hoc report: Pennsylvania Dept. of Health (DOH) Death Records report. Enhanced existing DOH Search screen to include Active Cases in County search.
2. Enhanced the participant match notification and application for Limited Access cases.
 - i. Hyperlink added to notification and application directing user to information page
 - ii. MDJS/CPCMS Participant Match Report enhanced to include limited access indicator
3. Guardian Case Load Summary Report enhanced to include a 'summary' report option. Enhanced report to exclude terminated guardianship and add case counts.
4. Request to allow court to close a single domain and maintain an active domain.
5. Request to revise the Guardian Removed Involuntarily case action to automatically generate an alert when the termination reason is 'Failure to Meet Court Standards'.
6. Notification subject changed to 'GTS-CMS Participant Match Found'.
7. Added message text to enter the closing case action when recording the Guardian Voluntarily Removed case action with reasons: IP Needs Met by Community, Restoration of Capacity or Expiration of Limited Order.
8. Updated manually entered reports to have a "Not Answered" selection option.
9. Guardian Relieved Involuntarily notification updated to include active cases for guardian.
10. Enhanced the annual Person and Estate reports to include an 'Amended Report' checkbox
11. Enhancement request to add IP Was Represented prompt to additional case actions and compare attorney representation data to case actions
12. Request to enhance the flag review process to allow a user to mark a report reviewed



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Upcoming Training

- Monthly Online Workshops for Guardians
 - April 8 & April 23
 - May 5 & May 18
 - June 5 & June 17
- Court Staff – New User Video Tutorials
 - 13 online tutorial videos
 - Accessible from the *Help* link
- Training updates posted to GTS News



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