



**MINNESOTA
JUDICIAL BRANCH**

MyMN Conservator (MMC) User Manual for Conservators

Revised May 14, 2014



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(MJB_SP_1063a)

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About MyMN Conservator (MMC)

MyMNConservator (MMC) is an online conservator account reporting application that allows conservators to file their inventory and annual accountings electronically. Specific attributes of this application include:

- Account information flows from inventory to annual account and from account to account, allowing courts to easily compare reporting from year to year.
- Court examination reports and Conservator Account Auditing Program (CAAP) audit reports file direct from MMC to the MN Case Information System (MNCIS).
- Address updates made in either system, MMC or MNCIS, automatically updates the address in the other.
- The filing of inventories and annual accounts by conservators create and complete reminder events in MNCIS.
- When the conservator files, judgments and bond information from MNCIS populate the annual account, and are available on the account report for the judge to review from either MNCIS or MMC.
- Professional conservators are able to assign cases to employees and add or remove employees in MMC.
- Conservators can designate an agent within MMC without having to submit a paper document.

Resources

There are several resources available on the <http://www.mncourts.gov/> website to assist with getting set up and using the MMC system. To access these resources directly, click the links below:

- The current Conservator Helpline (tel. 763-279-0176) is answered Monday through Friday between 1 and 5pm. Messages can be left on the Helpline 24/7 and calls are returned in the afternoon.
- [Self Help Center: Guardianship and Conservatorship](#)
- [Guardianship/Conservatorship Forms](#)
- [Introduction for Newly Appointed Guardians and Conservators](#) (required tutorial)
- [Frequently Asked Questions](#)

For Assistance

Contact your local Probate Court with questions regarding the MMC system. It is also recommended that the Court Administrator's Office of the Probate Division of the District Court in which the petition will be filed be contacted to determine which forms to use and what the correct filing fee will be.

Terms

Annual Account (also Periodic Account) – A report to the court detailing the handling of assets by a court-appointed conservator on behalf of a protected person over the course of a one-year period from the anniversary date of appointment.

CAAP – Conservator Account Auditing Program – The office that audits conservator accounts statewide.

Conservator - The person appointed to make financial decisions for the protected person. The conservator typically has the power to enter into contracts, pay bills, invest assets, and perform other financial functions for the protected person.

Conservatorship – A legal arrangement tailored to transfer financial decision-making power to the conservator only in the areas of life where protection and supervision by a conservator has been proven necessary.

Designated agent - An attorney or accountant designated by the conservator to complete financial reports to the court on the conservator's behalf.

Guardian – A person appointed by the court to make the personal decisions for the protected person.

Guardianship – A legal arrangement giving an appointed person the authority to make personal decisions on behalf of the protected person about such things as where to live, medical decisions, training and education, etc.

Refer to the [Guardianship and Conservatorship Manual](#) posted on the court's public site for more details on these terms and functions.

Inventory – A document that describes all assets of the protected person identified at the time the conservator was appointed.

MNCIS – MN Case Information System – The court's record management system.

Conservator Account Auditing Program (CAAP)

Annual accounts filed with the court are subject to examination and/or audit. An examination is a limited review of the account by the local court and may or may not require that you submit supporting documentation. An audit is a detailed review of the account by an auditor with the Minnesota Conservator Account Auditing Program (CAAP) and will require the submission of all supporting documentation for the protected person's assets. You will be contacted directly by CAAP when your account is selected for audit. It is a good idea to maintain your records in an orderly manner for each annual account and have them organized and labeled at the time you submit your report. It is recommended that your materials be organized as follows:

- Statements for financial accounts (i.e. checking, savings, investments, etc.) organize by account, then by date
- Billing statements, receipts, etc. organize by the category used within the account

For helpful information about managing the protected person's assets review: [Tips for Conservators.pdf](#).

About this Document

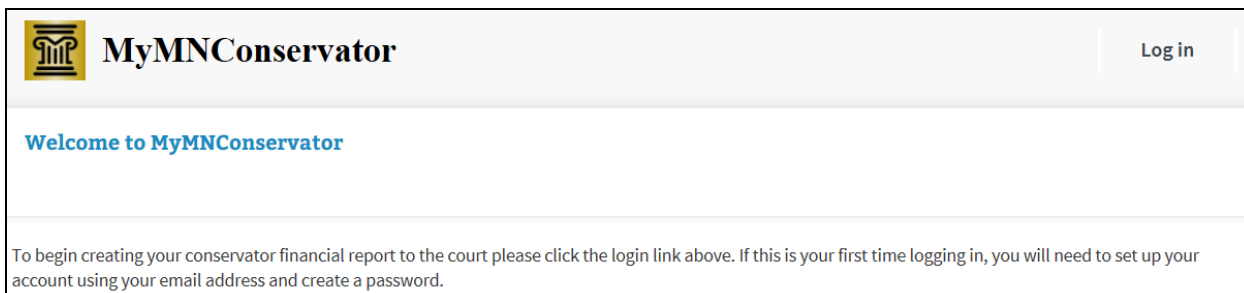
This document is available on the [state court website](#) under Programs and Services > Conservator Account Filing. It provides instructions to users on how to enter information in the MMC system. This document is not intended to instruct users on what information to enter. Due to the complexities of many of the proceedings to establish or maintain a Conservatorship, it is recommended that a person [talk with an attorney](#) with experience in Conservatorship law.

Getting Started

Accessing MyCourtMN Conservator System

A valid email address is needed to log into the MMC system.

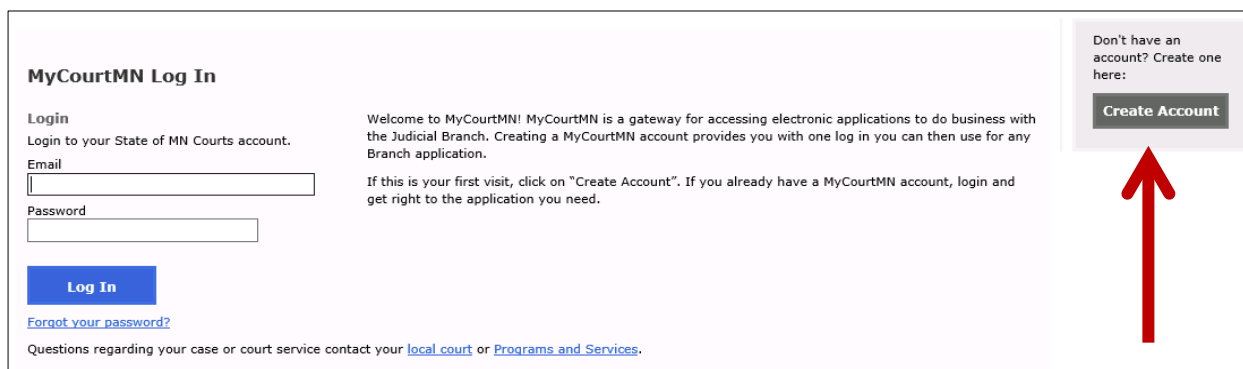
1. Go to the web page, www.mncourts.gov/conservators and click the **MMC Login** link. The welcome screen appears.



2. Click **Log In**. To begin creating your conservator financial report to the court, you will need to create a MyCourtMN Account.

Creating a MyCourtMN Account

1. From the welcome screen, click Log In. To access MMC, you will need a MyCourtMN account. If you do not already have a MyCourtMN account, click **Create Account**.



A screen opens for you to enter your profile information.

2. Enter your first and last name (required), and your middle name (optional).
3. Type your email address.
 - a. Your email address is your user name; it will be used to log into the application
 - b. Any important alerts are sent from the court to the email address you provide.
 - c. If you do not have an email address, there are many sites available that offer free email accounts. You can search the internet to locate sites that provide these services.

4. Enter your current address.

MyCourtMN New Account

Who are you?

First Name (required) Last Name (required) Middle Name

How can we contact you?

Email Address (required - this will be your user name). Important alerts will be sent to the email address provided.

Street Address City County

State Zip

Minnesota

Phone Number

5. Enter two security questions and two answers.
 - a. It is important to remember these questions and the answers as they will be used for validation if you forget your password or want to reset your password.
6. Enter the password you would like to use for the application.
 - b. A strong password is required and should contain upper and lower case letters, numbers and symbols, or other characters.
 - c. Retype the password for confirmation.
7. Click on and read the Terms of Service.

- Click the checkbox stating you have read and understand the Terms of Service.

Security questions

These questions will be used to verify your identity in the event you forget your password. In order to reset your password you must be able to provide the same answers you give here. Please create two questions that will be easy for you to remember and hard for others to guess.

Question 1

Answer

Question 2

Answer

Specify your password

A password strength of good or strong is required. When this requirement is met the bars below will be green. For your password to meet this requirement it will need a combination of upper case and lower case characters, numeric and other characters. Multiples of each add to the strength.

New Password

Password Strength:

Confirm Password

Confirm your changes

I have read and understood the [Terms of Service](#).

- Click **Save**. You will receive a confirmation message that an email has been sent to activate your account.

MyCourtMN New Account

Your Account has been created. Please check for a new email sent to mrconservator@gmx.com from MyCourtMN. This email will provide instructions for how to activate your account.
If you do not receive an email click this [link](#) to verify your information and make any necessary corrections.

Activating your Account


Once you have created a MyCourtMN account, an email will be sent to you from MyCourtMN@courts.state.mn.us.

Tip:

Check your spam folder if you do not see the email in your inbox.

- Click the link in this email to activate your account.

MyCourtMN New Account Confirmation

MyCourtMN@courts.state.mn.us 

To: mrconservator@gmx.com

Activate your account

Click this [link](#) to activate your account.

- A web page opens that your email address has been confirmed.

MyCourtMN Account Activation

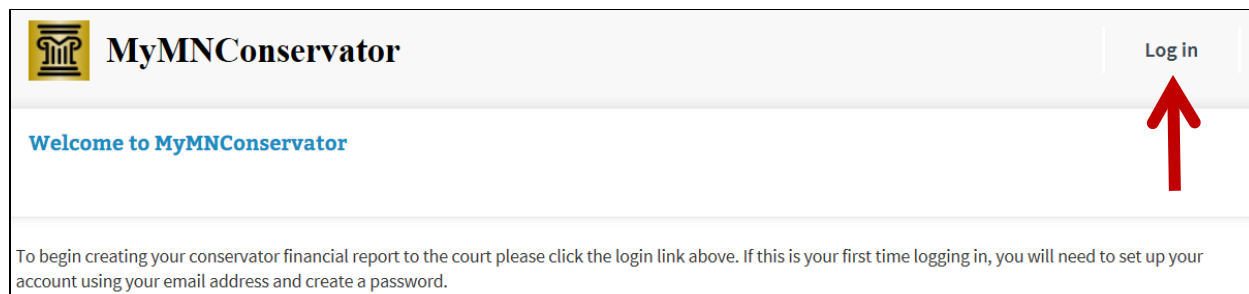
Your email address has been confirmed.

Please click this [link](#) to login.

- Click the link to login.

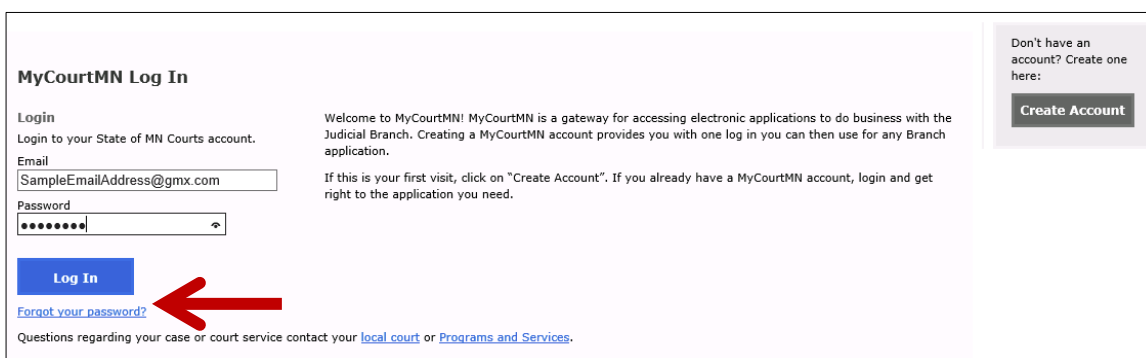
Logging In

Now you are ready to log in to MMC and connect to your account. From the MMC homepage, click **Log in** in the upper right-hand corner.



To begin creating your conservator financial report to the court please click the login link above. If this is your first time logging in, you will need to set up your account using your email address and create a password.

1. Enter your email address and the password you created for your MyCourtMN account



MyCourtMN Log In

Login
Login to your State of MN Courts account.

Email
SampleEmailAddress@gmx.com

Password
••••••••

[Log In](#)

[Forgot your password?](#)

Questions regarding your case or court service contact your [local court](#) or [Programs and Services](#).

Don't have an account? Create one here:
[Create Account](#)

Welcome to MyCourtMN! MyCourtMN is a gateway for accessing electronic applications to do business with the Judicial Branch. Creating a MyCourtMN account provides you with one log in you can then use for any Branch application.

If this is your first visit, click on "Create Account". If you already have a MyCourtMN account, login and get right to the application you need.

2. Click **Log In**.

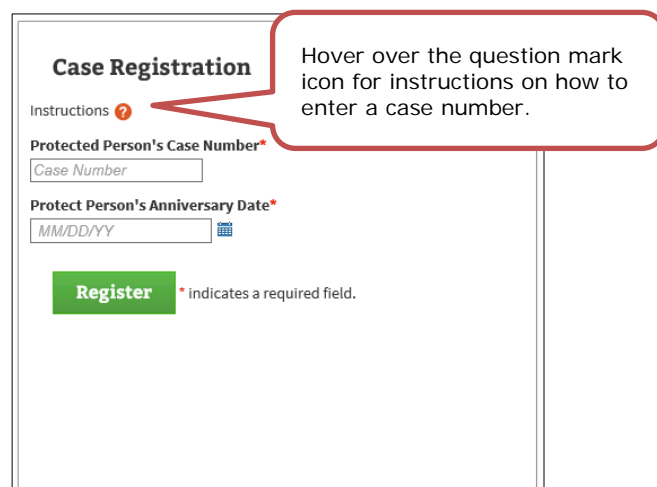
First Time Case Registration

To connect to your conservatorship case, enter your case number and anniversary date.

Case Number

To enter your case number, look at your court documentation and determine which scenario pertains to you. The letters are not case sensitive but you must use dashes.

- If the second set of characters in your case number contains PR or GC enter it as you see it in your court documentation.
 - EX: 41-PR-12-1110, 27-GC-PR-11-1110
- If the first number is 69 or 19 and is followed by two letters and then PR, enter the case number exactly as you see it.
 - EX: 69DU-PR-11-2588, 19HA-PR-10-789
- If the second set of two characters starts with P followed by something other than R, you will need to add zeroes ("0")'s to the beginning of the last set of numbers in the case number to make 6 digits in the last sequence.



Case Registration

Instructions ?

Protected Person's Case Number*

Case Number

Protect Person's Anniversary Date*

MM/DD/YY

[Register](#) * indicates a required field.

Hover over the question mark icon for instructions on how to enter a case number.

- EX: If your case number is 32-P2-91-2152, the case number you must enter is 32-P2-91-**00**2152
- EX: If your case number is 02-P6-05-23, the case number you must enter is 02-P6-05-**0000**23

Anniversary Date

- If you previously filed an annual account in MMC, use the period end date of the last account that you submitted in MMC.
- If you previously submitted ONLY an inventory in MMC, use the date of your Letters of Conservatorship.
- If you have never filed an inventory or account, use the date of your Letters of Conservatorship.

Register Your Case

- Once you have entered the correct data click **Register**.
 - If you are the only conservator on the case, click **Register**.
 - If there is more than one conservator on your case, it will ask you which conservator you are. Select the box by your name and click **Register**.



- You will see a message flash on the screen that says "Success."

Samples of errors

- If you do not get the "Success" message, make sure that you have the correct case number with all dashes and all zeroes as instructed above. Also check to make sure you are using the correct anniversary date and in the proper format.
- Once you have rechecked your information click Register; if you do not get a "Success" message, contact the conservator help line.

My Dashboard

Once you have successfully connected to your case, you will be taken to the Dashboard. The next time you log in, the Dashboard will automatically open.

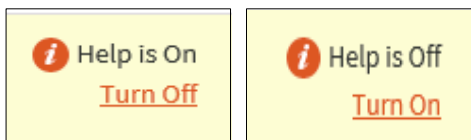
The screenshot shows the 'MY DASHBOARD' interface. At the top right, it says 'Hi Sample Conservator!' with a '(UPDATE LOGIN)' link. Below this, there are tabs for 'Conservator(s) ?' and 'Protected Person(s)'. A 'Filter' input field is present. A table with columns 'Protected Person(s)', 'Current Report', 'Case Number', 'Anniv Date', and 'Assigned To' is shown. A callout points to the filter field: 'In the Filter field, enter a name or file number to search for an account.' Another callout points to the table headers: 'Click an arrow in the headings to sort the columns.' A third callout points to the blue text 'Person, Sample': 'Click any text in blue to access that information.' The table shows one record with 'Person, Sample' in blue, 'Invent (New)' in blue, '03/01/2014', and 'You' with an edit icon. Navigation buttons 'First', 'Previous', '1', 'Next', 'Last' are at the bottom.


Navigation

- Any text in blue is a hyperlink.
- The tabs at the top of the screen can be clicked in any order.
- In the filter box at the top, you can filter by name or file number (or partial name/file number).

Online Help

- MMC contains help text and short videos to assist conservators in working with the application. These resources are located at the top of most screens within MMC. If you would like to turn on or off the Help feature, click the corresponding links shown below.



- To access the quick help feature, hover over the question mark icon . Additional information about the system will appear.

Professional Conservators

The Dashboard has a different appearance if you are a conservator for multiple protected persons. You may find the sort and filter features are more helpful in managing accounts. If you are a professional conservator with employees, you will see which employee is assigned to which case.

Setting up the Conservator Profile

A list of all active protected persons cases to which you are assigned appears on the Protected Persons tab. When you enter MMC for the first time, you will need to add your current address as the conservator and the current address of the protected person. Please keep these addresses updated as needed. To add or update the conservator address and phone number, click **Edit**.

The screenshot shows the 'MY DASHBOARD' interface. At the top right, it says 'Hi Sample Conservator!' with a link to '(UPDATE LOGIN)'. Below this is a navigation bar with tabs for 'Conservator(s)', 'Protected Person(s)', 'Notifications', and 'Reports'. The 'Conservator(s)' tab is active, showing a table with one entry: 'Sample Conservator'. A red arrow points to the 'Edit' button next to this entry. The table has columns for 'Protected Person(s)', 'Current Report', 'Case Number', 'Anniv Date', and 'Assigned To'. The entry shows 'Person, Sample', 'Inventory Report (New)', '14-PR-14-5', '03/01/2014', and 'You'.

1. From the Profile page, enter your address information.
2. Enter your current email address and click **Add**.

Notes:

- If the address you are entering does not fit in the format provided, contact the conservator help line for assistance.
- You may add additional email addresses here for other parties to receive notifications from MMC (e.g., your attorney).

3. Designate whether you would like to receive alerts and/or notifications by checking in the applicable checkbox.
4. Click **Save Changes**.
This updates the address in MMC and also in the court file management system (MNCIS).

Profile

Conservator

Name
Sample Conservator

Phone

Phone Number
Phone Number

Address ?

Street No* Direction Street Name* Street Type Direction

Unit Type Unit No City* State* Zip Code*

Email Addresses

SampleEmailAddress@gmx.com
 Add

Email Notifications

Receive Alert Emails Push Notifications

Save Changes or Cancel
* = Required

Setting up the Protected Person Profile

1. From the Dashboard, click the Protected Person's name hyperlink.
2. From the Report History page, click **Edit**.
3. Enter the phone number and address information and click **Save Changes**.
The Protected Person's address will be saved in MMC, as well as MNCIS.

Adding Additional Cases

1. If you are newly appointed as conservator on another case, the case should appear on your dashboard in MMC once your Letters of Conservatorship are issued. If the case does not appear, add the new case (or add additional old cases) as follows:
2. From the Dashboard, on the Protected Person(s) tab, click **Add Case**.

3. Follow the instructions above for registering a case.

Notifications

Some notifications may be sent to your email. In addition, the Notifications tab provides the following types of messages from MCC:

- Automated reminders about reports that are due or overdue to the court
- Co-conservators and agents that have been added to your case
- Cases on which you have been discharged or your appointment is concluded
- Messages from court staff or court auditors about accounts that are under review

The screenshot shows a web interface for a conservator's dashboard. At the top left, it says "MY DASHBOARD". At the top right, it says "Hi Sample Conservator!" with a link to "(UPDATE LOGIN)". Below this is a navigation bar with three tabs: "Protected Person(s)", "Notifications" (which is selected and highlighted in blue), and "Reports". On the left side, there is a section titled "Conservator(s) ?" containing a "Sample Conservator" entry with a sub-label "Conservator" and an "Edit" button. The main content area of the "Notifications" tab displays the message: "There are no notifications at this time."

Inventory Report

The Reports tab displays a comprehensive list of reports to review or work on. From this screen you may click to review and print previously submitted reports. The reports appear with the most recently submitted report at the top.

- To review and print previously submitted reports, click **Review**.
- To access reports for updating, click **View** or **Get Started**.

The screenshot shows a web dashboard titled "MY DASHBOARD". In the top right corner, it says "Hi Sample Conservator" with a link "(UPDATE LOGIN)". Below this is a navigation bar with tabs: "Conservator(s)", "Protected Person(s)", "Notifications", and "Reports" (which is highlighted in blue). On the left, under "Conservator(s)", there is a "Sample Conservator" entry with an "Edit" link. The main content area shows an "Inventory Report (New)" for "Sample Conservator" with case number "14-PR-14-5" and a due date of "04/30/2014". A green "Get Started" button is present, and a message indicates "44 Day(s) remaining to file".

For Conservators Transitioning from CAMPER

If you have previously submitted reports in CAMPER you will need to enter a conversion inventory to bring your account assets into MMC.

Conversion Inventory

1. Click the Red hyperlink **Previous CAMPER Data**.

SAMPLE PERSON INVENTORY REPORT
CASE NUMBER : 14-PR-14-5
[Previous CAMPER Data](#)

- a. A pop-up window displays the number of the annual account that was last submitted in CAMPER and the concluding balances of the assets from that account. Use these balances rather than going back to the date of your Letters of Conservatorship as directed in the instructions for new conservators.
- b. Use this information to complete your conversion inventory in MMC. You can copy and paste from this window. If this information doesn't correspond to your last submitted report, contact the help line.

- c. This conversion inventory will not be filed with the court but will only be used to enter your assets into MMC.
- d. The court will compare the assets ending in CAMPER to the assets entered into MMC.
- e. In MMC you are not required to enter personal property items unless the value is \$500 or greater. For household goods (including furniture, clothing, etc.) enter the combined value if \$500 or greater.
- f. Your first report to the court as a conservator will be an inventory.

Starting an Inventory

From the Dashboard, under Current Report click **Inventory Report**. This opens your report.

An overview of the totals will appear on the right hand side.

This information changes as new assets are added to your inventory.

- Bondable Assets = all financial assets and personal property
- Net Balance = bondable assets – debt
- Total Assets = bondable assets + real estate (debt is not included)

Financial Assets:	\$0.00
+ Personal Property:	\$0.00
= Bondable Assets:	\$0.00
Bondable Assets:	\$0.00
- Debt (not including real estate):	\$0.00
= Net Balance:	\$0.00
Bondable Assets:	\$0.00
+ Real Estate:	\$0.00
= Total Assets: (under court jurisdiction)	\$0.00

Adding an Account

1. From the Financial Accounts tab, click **Add Account**.

Financial Accounts
Personal Property
Real Estate
Review & Submit

Files: There are currently no files uploaded. Upload a File

All Accounts
All accounts for Sample Person. Add current balances of accounts as of 03/01/2014.

➔
Add Account
Export Accounts

2. Enter the account name.
3. Select type of account from the drop-down menu.
4. Enter the value of the account as of the date of your Letters of Conservatorship.
5. Enter your account number.

Note:

The tabs under Account Types have numbers in parenthesis that change as you enter additional accounts counting the number of each type of account that you have.

6. Click **Save**.
 - a. If you have other accounts repeat the process for each account
 - b. On the right side of your screen you will note that the values and totals in each box change as you enter information.
7. When you have completed entering your financial accounts, move to the Personal Property tab.

Adding Personal Property

Reflect properties and their values as of the appointment date or as close as possible.

In MMC you are not required to enter personal property items unless the value is \$500 or greater. For household goods (including furniture, clothing, etc.), enter the combined value if \$500 or greater. Do not list individual items within this grouping.

Does the protected person have individual jewelry, precious metals, coin or other collections, antiques, furs, art or individual furniture items that are worth \$500 or more? Items such as vehicles, boats and recreational vehicles are also reported here. You should also report general household goods including clothing if, when combined, have a total value of \$500 or greater.

Note:

Documentation to support changes in the value of personal property items may be uploaded in MMC. See directions for uploading a file.

If your protected person has personal property that you feel may be valuable but you do not know the value, consider getting an appraisal. There are also online tools for finding values of vehicles such as Kelly Blue Book.

1. To enter the property, click **Add Property**.
2. Enter the description of the property.
3. Enter the value of the property.
4. Select property type from the drop-down.
5. Indicate if there is a loan on the property.
 - a. If yes and you have already entered the loan on the Financial Accounts tab, select the appropriate account from the drop-down.
 - b. If you have not previously entered the loan, select No, click **Save**, go to the Financial Accounts tab, and add the loan. (See Adding Financial Transactions.)
 - c. Once you have added the loan return to the Personal Property tab, click **Edit** for the property to which you need to add the loan. Click **Yes** to loan on property if it is not already checked and connect the loan.
6. Click **Save**.

Adding Real Estate

Does the protected person own any real estate including a home, rental property, land or business property?

To determine the value of real estate, use a recent property tax statement. You are not required to change the value from year to year. Any loss or gain from that value will be determined should the property later be sold. Use the mortgage value for the property as of the date of your Letters of Conservatorship.

1. To enter real estate click **Add Real Estate**.

SAMPLE PERSON INVENTORY REPORT
CASE NUMBER : 14-PR-14-5
[Previous CAMPER Data](#)

Financial Accounts Personal Property **Real Estate** Review & Submit

Files: There are currently no files uploaded. [Upload a File](#)

All Real Estate **Add Real Estate** [Export Real Estate](#)

Real Estate Types

Description	Type	Value
All Real Estate (0)		

1. In the Description field, enter the address or location description.
2. Select the real estate type from the drop-down.
3. Enter the value from the latest tax statement.
4. Enter the year of the tax statement.
5. Indicate if there is a mortgage on the property.
 - a. If there is a mortgage on the property click **Yes**.
 - b. Enter the current mortgage balance from the statement closest to your anniversary date.
 - c. Enter the interest rate from the mortgage statement.
 - d. Enter the monthly payment from the mortgage statement.
6. Indicate if there is rental income on the property.
 - a. If there is rental income, click **Yes**.
 - b. Enter the monthly income that is usually received.
7. Indicate if there are liens on this property.
 - a. If there are liens on this property click **Yes**.
 - b. In the Description field, enter the lien holder name and the amount of the lien.
8. Click **Save**.

Recording the Sale of Real Estate

Note:

A court order is required to sell real estate.

1. From the Real Estate tab, select the property sold from the list on the left.
2. Click **Yes** to the question "Have you sold this Real Estate?"
3. To add the income transaction for the sale:
 - a. Enter the sale date.
 - b. Enter the Sale Description (i.e. Sold to John Doe).
 - c. Enter the amount received from the sale.
 - d. Note the account into which the proceeds were deposited.

The screenshot shows a software interface with a navigation bar at the top containing 'Financial Accounts', 'Income & Expenses', 'Personal Property', and 'Real Estate'. Below the navigation bar, there is a 'Files' section with the text 'There are currently no files uploaded.' and an 'Upload a File' button. The main content area is titled 'Cabin Vacation Home' and includes 'Add Real Estate' and 'Export Real Estate' buttons. On the left, there is a 'Real Estate Types' sidebar with 'Cabin Vacation Home' selected. The main form contains the following fields and options:

- Description***: Cabin
- Real Estate Type**: Vacation Home
- Tax Value***: \$200000.00
- Is there a mortgage on the property?**: Yes No
- Is there rental income?**: Yes No
- Are there any liens or encumbrances on the property?**: Yes No
- Have you sold this Real Estate?**: Yes No (A red arrow points to the 'Yes' radio button.)
- Tax Year**: 2014
- Add an Income Transaction for the real estate sale:**
 - Sale Date**: 03/17/2014
 - Sale Description**: Sold
 - Sale Amount**: \$220000
 - Proceeds Deposited Into**: Savings Account (\$600.00)

Buttons for 'Save' and 'Cancel' are located at the bottom right of the form, with a note '* = Required' below them.

Editing Account Information

- In the appropriate section, click **Edit** to update your address as conservator or the Protected Person's address.
- Click any text in blue to return to a part of the inventory and make changes.


Printing Account Inventory Report

Click **Print** to preview your inventory report and/or print a copy of the inventory report to provide to the protected person and the interested parties.

1. The print preview of the inventory opens in a new window in your browser.
2. From the print preview of the report you have two options to print:
 - a. Right-click your mouse and choose **Print** from the menu, or
 - b. From the **File** menu in the upper-left corner of your browser, select **Print**.

Submitting the Inventory to the Court

When you have entered all the information in your inventory, go to the Review & Submit tab. The Review & Submit tab also allows you to preview your inventory report at any time while you are working on it.


MyMNConservator

[← Back To My Dashboard](#)
Log Off

SAMPLE PERSON INVENTORY REPORT 44 Days To File No Updates
 CASE NUMBER : 14-PR-14-5
[Previous CAMPER Data](#)

Financial Accounts

Personal Property

Real Estate

Review & Submit

Report Information

Due Date
4/30/2014

County
Clay

Judicial District
7th District

Case Information

Case Number
14-PR-14-5

Anniversary Date
3/1/2014

Protected Person Profile Information

Sample Person
3 North 31St Ave
Anoka, MN 55449
[Edit >](#)

Conservators

Sample Conservator
4 41St Blvd
Anoka, MN 55449
[Edit >](#)

Overview

Total Inventory Balance **\$0.00**

FINANCIAL OVERVIEW

Total: \$0.00

Description	Type	Net Value

Submit

Print

Financial Assets:
\$0.00

+

Personal Property:
\$0.00

= Bondable Assets:
\$0.00

Bondable Assets:
\$0.00

-

Debt
(not including real estate)
\$0.00

= Net Balance:
\$0.00

Answer a series of questions to submit your report:

1. Indicate if you are a Professional conservator.
 - a. A professional conservator is defined as someone appointed for three or more protected persons that are not related to the conservator.
2. The Bond Information box shows you the surety bond(s) that the court has on file for this case.
 - a. Indicate if there are any bonds that are not reported above.
 - i. If yes, add the company name and amount of the bond and click **Add**.
 - b. Indicate if this information correctly shows the bonds that now exist in this case.
 - i. If no, provide the correct information in the comment box for the court to review.

Bond Information

There are no bonds in this case.

State statute requires if the value of personal property is at least \$10,000, the court shall require the conservator to post a bond. Contact the local court to determine if a bond is required.

Are there any bonds? Yes No

Does this information correctly show the bonds that now exist in this case? Yes No

Previous

Next

3. Indicate if you have provided Affidavit of Service.
 1. By checking this box, you confirm that you have provided a copy of the inventory to the protected person and any interested parties
 2. In the comment box enter the names of all interested parties that were served. Separate the names with a comma.

Affidavit of Service

A copy of the report was given to Sample Person and the following interested parties:

[Link to forms page on MJB website](#)

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Next

4. Confirm the accuracy of the report.
 - a. By checking this box you will confirm, under penalty of perjury:
 - i. that you have read the Inventory Report,
 - ii. that it is an Inventory Report of all property belonging to the protected person,
 - iii. that you do not know of any mistake in the Inventory Report, and
 - iv. that the inventory is correct to the best of your knowledge and belief.

5. From here you may print a copy of the report, return to the previous questions, go back and make changes to the inventory, or proceed to submit the report.
 - a. If you return to the inventory, you will need to go through the submit process again.
 - i. Click **Submit** to file your inventory with the court. This may take a few minutes.
6. You will receive a verification message indicating if your submission was successful.
 - a. If your inventory was successfully submitted, it will be sent to the court.
 - b. If your inventory failed to send:
 - i. Check your internet connection. If your internet connection is ok, try to re-submit.
 - ii. If the inventory still fails to send, contact the service desk via the link at the bottom of this website: www.mncourts.gov/conservators
 - c. Once submitted you will be returned to the review page where you may again print the report if you wish.
7. You may now return to your dashboard or log off.

Annual Account

Starting the Annual Report

To start your account, from the Dashboard under Current Report, click **Annual Report**. This opens your report. An overview of the totals will appear on the right hand side. This information changes as new assets are added to your inventory.

Note:

If this is a final account, check the **Final Report** checkbox at the top of the account screen and from the drop-down menu, select the reason for this being a final report.

- Bondable Assets= All financial assets and personal property
- Net Balance= Bondable assets – debt
- Total Assets= Bondable assets + real estate (debt is not included)

Recording Income and Expenses

1. From the Income and Expense tab, click **Add Transaction**.

The screenshot shows the 'Income & Expenses' tab selected. At the top, there are navigation tabs: 'Financial Accounts', 'Income & Expenses' (active), 'Personal Property', 'Real Estate', and 'Review & Submit'. Below the tabs, there is a 'Files' section with 'Upload a File' and 'Help is Off Turn On'. The main area shows 'Another Savings Account Savings' with links for '.CSV Upload', 'Add Transaction' (highlighted with a red arrow), and 'Export Transaction'. There are also links for '.CSV Help' and '.CSV Template'. A table with columns 'Date', 'Description', and 'Amount' is visible, with a red arrow pointing to the 'Add Transaction' button. A 'Financial Assets: \$300.00' box is on the right.

Note:

When you first enter MMC, the transaction date defaults to the current date; once you've entered a transaction, the date defaults to the last date entered.

The screenshot shows the 'Add Transaction' form. It has three main input fields: 'Date*' with the value '03/13/2014', 'Description*' with the value 'Received from', and 'Amount*' with the value '\$0'. Below these are two checkboxes: 'Income' (checked) and 'Expense' (unchecked). There is a 'Category' dropdown menu. At the bottom, there is an 'Account' dropdown menu with the selected value 'Another Savings Account (Savings) \$500.00'. To the right of the account dropdown are 'Save' and 'Cancel' buttons. A note '* = Required' is at the bottom right. At the very bottom of the form, there is a summary row: '03/13/2014', 'Account not reported', and '\$500.00'.

2. Enter the date.
3. Enter a Description for the transaction (e.g., received from, or payable to).
4. Enter the Amount.
5. Check Income or Expense.
6. Select a category relevant to the transaction. (If multiple categories apply, select one relevant category for the initial entry and see the following instructions for splitting the transaction.)
7. Select your account. (Once your account is selected, it will default to that account.)
8. Click **Save**.

Entering Split Transactions

A split transaction reflects more than one category for one income or expense entry. After entering the transaction for the full amount (refer to Recording Income and Expenses) perform the following the steps:

1. Click the transaction to be split.
2. Click **Split Between Categories**.
3. Enter the category and the amount to be split out from the original entry
 - a. For multiple splits, click **Add More**.

Adding a New Financial Account

If you need to add an additional account because you discover an asset that was omitted from the inventory, add a new Financial Account.

1. From the Financial Accounts tab, click **Add Account**.
2. Enter information of the account being added (without the value).

The screenshot shows the 'Financial Accounts' tab selected in a navigation bar. Below the navigation bar, there is a 'Files' section with a message 'There are currently no files uploaded.' and an 'Upload a File' button. The main content area is titled 'All Accounts' and contains two buttons: 'Add Account' (highlighted with a red arrow) and 'Export Accounts'. Below this, there is a 'Bank Account (2) (i.e. Checking, Savings)' section and a 'Bank Account (2) (i.e. Checking, Savings)' section. The 'Bank Account (2) (i.e. Checking, Savings)' section is expanded, showing a form with the following fields: 'Account Name*' (text input with 'Another Savings Account'), 'Account Type' (dropdown menu with 'Savings Account'), 'Value*' (text input with '\$0.00' and a red question mark), 'Account Number*' (text input with '5577'), and 'Interest Rate' (text input with '0.00'). There are 'Save' and 'Cancel' buttons at the bottom right of the form, and a note '* = Required'.

3. Click **Save**.
4. Go to the Income and Expense tab.
5. Select **Add Transaction**.
6. Select **Income**.
7. Enter the date of discovery of asset.
8. Enter the description of asset (e.g., Discovered new account, or Account not reported, etc.).
9. Enter the value of the asset on the date of discovery.
10. Select the category **Asset Omitted from Inventory/Account**.

11. Select the account that was entered in the first step.

Date*	Description*	Amount*
03/13/2014	Account not reported	\$ 500
<input checked="" type="checkbox"/> Income <input type="checkbox"/> Expense		
Category Assets Omitted from Inventory/Account		
An asset discovered after the inventory has been filed may be entered here.		
Account Another Savings Account (Savings) \$0.00		Save or Cancel * = Required

12. Click **Save**.

Opening a New Financial Account with Funds from an Existing Asset


1. From the Financial Accounts tab, select **Add Account**.
2. Enter information of the account being added (without the value).
3. Click **Save**.
4. Open the account from which you transferred the funds.
5. Select **Transfer Funds**.

Financial Accounts	Income & Expenses	Personal Property	Real Estate
Files: There are currently no files uploaded.			Upload a File
All Accounts		Add Account	Export Accounts
Account Types			
All Accounts (4)			
Bank Account (3) (i.e. Checking, Savings)			
Investment (0) (i.e. Stocks, Bonds)			
Name	Type	Value	
Account Name Checking Account	Account Type Checking Account	Value * \$200.00	? Transfer Funds
Account Number x2345			
Close/Remove Account <input type="checkbox"/>			Save or Cancel
Close			

- Select the new account from the account list under "To".

Transfer Funds Between Accounts

From:

To:
 

Transfer Date:

Select Transfer Amount:
 Entire Account Balance

or

- Enter the date the new account was opened (the date the funds were transferred).
- Enter the transferred amount (or check Entire Account Balance).
- Click **Save Changes**.
- You will receive a verification window; if it is correct, click **Transfer**.
 - If it is not correct, click **Edit** and make corrections.

On the right side of your screen you will note that the values and totals in each box change as you enter information.

Closing an Account

You may need to report that an account has been closed. To close an account, the value of the account must be zero. If the balance is not zero, report the appropriate transactions to bring the account to zero. If you transferred the existing balance to another account, you will be given the opportunity to report that transfer within this process.

- From the Financial Accounts tab, select the account you want to close.
- Check the box that states **Close/Remove Account**.

Financial Accounts
Income & Expenses
Personal Property
Real Estate

Files: There are currently no files uploaded.


All Accounts

Account Types

All Accounts (4)

Bank Account (3)
(i.e. Checking, Savings)

Investment (0)
(i.e. Stocks, Bonds)

Name	Type	Value
Account Name Checking Account	Account Type Checking Account	Value * \$150.00 
Account Number x2345		
Close/Remove Account <input checked="" type="checkbox"/>		<input type="button" value="Save"/> or <input type="button" value="Cancel"/>
<input type="button" value="Close"/>		

3. Click **Save**.
4. If the account is not at zero, a message will appear:
 - a. "There is a balance on the selected account. In order to close this account, you must transfer the remaining balance or report appropriate transactions."
 - i. If you transferred the funds, click **Transfer Remaining Balance**.
 - ii. Select the account to transfer from the account list under "To".
 - iii. Click **Transfer entire balance**.
 - iv. Click **Save Changes**.
 - v. At the verification window, if everything is correct, click **Transfer**.
 - vi. If it is not correct, click **Edit** and make corrections.
5. At the conformation message, "Are you sure you want to close this account?" select **Yes**.
6. The account you closed should now say Closed in the value column.

Disposing of Personal Property

1. From the Personal Property tab, select the property item to be disposed.
2. Answer Yes to the question "Did you dispose of this personal property?"
3. Enter the date the property was disposed.
4. Enter a Disposition Description (i.e. sold, destroyed, donated, stolen, etc.).
5. If it was a court-ordered disposal, check the applicable box.
6. If funds were received for the asset:
 - a. Note the account into which the proceeds were deposited.
 - b. Enter the amount received.
7. Click **Save**.
8. The value for this item will change to "DISPOSED" on the Personal Property tab.

Description	Type	Value
Car	Car/Truck	\$10,000.00

Description* Value*

Type

Court order purchase

Loan On Property?
 Yes No

Did you dispose of this personal property? Yes No

Add an Income Transaction for the property sale:

Date* Disposition Description*

Proceeds Deposited into

Court order disposal

Sale Amount* Category

Save or Cancel
* = Required

Close

Submitting the Annual Account to the Court

Answer a series of questions before you submit your report:

1. Indicate if you are a professional conservator.
 - a. A professional conservator is defined as someone appointed for three or more protected persons that are not related to the conservator.
2. If there is a judgment against you on this case, the information from the court record will appear here.
 - a. If the information is accurate, click **Yes**.
 - b. If the information is not accurate, click **No** and enter the correct information. This information will be sent to the court for review.
3. The Bond Information box shows the surety bond(s) that the court has on file for this case.
 - a. Indicate if there are any bonds that are not reported above.
 - i. If yes, add the company name, amount of the bond, and click **Add**.
 - b. Indicate if this information correctly shows the bonds that now exist in this case.
 - i. If no, provide the correct information in the comment box for the court to review.
4. Indicate if any court has ever removed you or any co-conservator from serving as a conservator or guardian.
 - a. If Yes, enter the conservator, state, county, city and case number.
 - b. If No, continue to the next question.

Removal Information

Has any court ever removed you or any co-conservator from serving as a conservator or guardian? If yes, enter conservator, state, county, city, and case number.

Yes No

Conservator	State	Case Number
Conservator	State	Case Number
<input type="text" value="Sample Conservator"/>	<input type="text" value="Alabama"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

5. The Reimbursement Information dialog shows the guardian/conservator fees that you reported within the annual account.
 - a. Indicate if you received any additional compensation for your service as a conservator and or guardian.
 - i. If Yes, provide the amount.
 - ii. If No, indicate **No** and click **Next**.

Reimbursement Information

Guardian/conservator fees reported on this annual report:
\$0.00

Did you receive additional compensation for your services?

Yes No

Amount \$

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6. Checking the box in the Affidavit of Service dialog confirms that you have provided a copy of the account to the protected person and any interested parties.
 - a. In the comment box, enter the names of all interested parties that were served.
 - b. Separate the names with a comma.

Affidavit of Service

A copy of the report has been given to Sample Person and the following interested parties:

(Separate names with a comma)

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7. Check the box indicating, "The Annual Notice of Rights was given to the protected person and the interested parties:"
 - a. In the text box, enter the interested parties that were served.

Annual Notice of Rights

The Annual Notice of Rights was given to Sample Person and the following interested parties:

[Link to forms page on MJB website](#)

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- b. The link in this box provides you with a link to the court forms website and the Annual Notice of Rights Form.
 - i. Go to this webpage, print the Annual Notice of Rights if you have not previously done so.
 - ii. Complete and serve the Annual Notice of Rights, along with a copy of the annual account on the protected person and the interested parties.
 - iii. You may stop at any time during the submit process to complete this task.
8. By checking the Accounting Confirmation box, you are stating, under penalties for perjury, that you:
 - a. have read this account report,
 - b. that this is a full accounting of all property belonging to the protected person,
 - c. that you do not know of any mistake in the report, and
 - d. that it is correct to the best of your knowledge and belief.
9. Here you may print a copy of the report, return to previous questions, go back and edit your account or submit the report.
10. If you return to the account, you will need to go through the submit process again.
11. Click **Submit** to file your report with the court. This may take a few minutes.
12. You will receive a verification of submission message that indicates:
 - a. Your inventory was successfully sent to the court, or
 - b. Your inventory failed to send.
 - i. If there is a failure to send, check your internet connection.
 - ii. If your internet connection is ok, try to re-submit.
 - iii. If the account fails to send, contact the service desk via the link at the bottom of this website: www.mncourts.gov/conservators.
13. Once submitted you will be returned to the review page where you may again print the report.
14. You may now return to your dashboard or log off.

Recording Conservatorship Reimbursement

From the Reimbursement Information dialog, you will see the guardian/conservator fees that you reported within the annual account. Indicate if you received any additional compensation for your service as a conservator and or guardian.

- If Yes, provide the amount.
- If No, click **Next**.

Reimbursement Information

Guardian/conservator fees reported on this annual report:
\$0.00

Did you receive additional compensation for your services?

Yes No

Amount \$

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Recording Annual Notice of Rights Given

Check the box indicating, "The Annual Notice of Rights was given to the protected person and the interested parties:" In the text field, enter the interested parties that were served.

Annual Notice of Rights

The Annual Notice of Rights was given to Sample Person and the following interested parties:

[Link to forms page on MJB website](#)

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The hyperlink, "Link to forms page on MJB website" to go to the court forms website and the annual notice of rights form.

- Click the link to go to this webpage and print the Annual Notice of Rights if you have not previously done so.
- Complete and serve the Annual Notice of Rights, along with a copy of the annual account on the protected person and the interested parties.
- You may stop at any time during the submit process to complete this task.

Uploading a File

You may provide supporting documentation relative to your inventory or annual account by uploading a file in MMC.

Materials such as appraisals, receipts, bank statements, and investment account statements that support your annual account can be uploaded and stored in MMC. Only PDF files can be uploaded in MMC. You may search the Internet for instructions on how to create a PDF file if you are unsure how to do that. These documents will be accessible to court staff when they review your accountings and conservator account auditing program auditors when they audit your accounts. These files will NOT be filed with the court in the court case management system.

To upload a file:

1. Go to your inventory or annual account associated with the file.
2. Click **Upload a File**.

Financial Accounts | **Income & Expenses** | **Personal Property** | **Real Estate** | **Review & Submit**

Files: There are currently no files uploaded. [Upload a File](#) Help is Off
Turn On

All Personal Property [Add Property](#) [Export Property](#)

Account Types	Description	Type	Value
All Personal Property	Car	Car/Truck	\$10,000.00
	Necklace	Jewelry	DISPOSED

Financial Assets: **\$1,100.00**
+
Personal Property: **\$10,000.00**

3. Click **Browse** and select the file you want to upload.
4. Click **Open**.
5. Click **Upload**.

Exporting Account Information to a Spreadsheet

You may export your financial accounts, income and expense transactions, personal property listing or real estate information to a spreadsheet following these instructions. You will need a spreadsheet program to perform this task.

Exporting Financial Accounts to a Spreadsheet

1. From the Financial Accounts tab, click **Export Accounts**.
2. A pop up message will ask, "Do you want to open or save FinanceAccounts.csv from mmcqa.courts.state.mn.us?"
3. Your options are Open, Save, or Cancel. Click **Open**.
4. A spreadsheet of your account information will open.

Exporting Income and Expense Information to a Spreadsheet from an Annual Account

- From the Income & Expense tab, click **Export Transactions**.
- A pop up will ask "Do you want to open or save Transactions.csv from mmcqa.courts.state.mn.us?"
- Your options are Open, Save, or Cancel. Click **Open**.
- A spreadsheet of your transaction information will open.

Exporting Personal Property Information to a Spreadsheet

- From the Personal property tab, click **Export Property**.
- A pop up will ask "Do you want to open or save Personal Property.csv from mmcqa.courts.state.mn.us?"
- Your options are Open, Save, or Cancel. Click **Open**.
- A spreadsheet of your personal property information will open.

Exporting Real Estate Information to a Spreadsheet

- From the Real Estate tab, click **Export Real Estate**.
- A pop up will ask "Do you want to open or save Realestate.csv from mmcqa.courts.state.mn.us?"
- Your options are Open, Save, or Cancel. Click **Open**.
- A spreadsheet of your real estate information will open.

Additional MMC Features

Removing Conservatorship

Indicate if any court has ever removed you or any co-conservator from serving as a conservator or guardian.

- If Yes, enter the conservator, state, county, city and case number.
- If No, click **Next**.

Removal Information

Has any court ever removed you or any co-conservator from serving as a conservator or guardian? If yes, enter conservator, state, county, city, and case number.

Yes No

Conservator	State	Case Number
Conservator	State	Case Number
Sample Conservator	Alabama	

Viewing Report History

From the Dashboard, click the Protected Person's name hyperlink, which will take you to the Report History tab showing a list of reports for the case. The following statuses will appear next to the report:

New	The account has not been started.
In Progress	The account is being worked on, but has not been submitted.
Submitted	The account has been submitted.
Audit Queue	The account is in the audit queue.
Closed	The account has been submitted and the court review or audit process is complete.

Designating an Agent

If you have previously used a designated agent to complete your account filing, you will need to re-designate an agent to allow them access to your case in MMC. An agent is typically an attorney or an accountant.

The Designated Agent will need to connect to the case using the same method that you use. They will need to set up their own MyCourtMN account and connect the case with the case number and anniversary date.

To designate an agent to assist with preparing your reports, under the Assigned to column, click the pencil icon.

1. From the dialog box, click the checkbox indicating **Enable Designated Agent**.
2. Click **Save Changes**.

On the Dashboard, under the Assigned To column, you will see "You & Designated Agent".

Un-designating an Agent

1. Next to You & Designated Agent, click the pencil icon.
2. From the dialog box, uncheck the box indicating **Enable Designated Agent**.
3. Click **Save Changes**.

Updating Your MyCourtMN Information

To change your login information (email address or password), click **Update Login**. Address changes made here DO NOT update your information within MMC or the court record. This is only to update your MyCourtMN account.

The screenshot shows the MyMNCconservator dashboard. At the top right, there is a 'Log Off' link. Below the dashboard title, there is a 'MY DASHBOARD' section. On the right side of the dashboard, the user is identified as 'Hi Sample Conservator!' with a link '(UPDATE LOGIN)' below it. A red arrow points to this link.

The screenshot shows the user profile section. The user is identified as 'Sample Conservator' with the email address 'sampleemailaddress@gmx.com' and a '(login history)' link. To the right of the profile information, there is a red arrow pointing to a link that says 'Edit Account, Password, Email'.

Logging Out

When you have finished updating and are ready to leave the program, click **Log Off**.

The screenshot shows the MyMNCconservator dashboard. At the top right, there is a 'Log Off' link. A red arrow points to this link. Below the dashboard title, there is a 'MY DASHBOARD' section. On the right side of the dashboard, the user is identified as 'Hi Sample Conservator!' with a link '(UPDATE LOGIN)' below it. Below the dashboard, there is a section for 'Conservator(s)' with a dropdown menu showing 'Sample Conservator' and an 'Edit' button. There are also tabs for 'Protected Person(s)', 'Notifications', and 'Reports'. A table is visible with columns for 'Protected Person(s)', 'Current Report', 'Case Number', 'Anniv Date', and 'Assigned To'. There is also an 'Add Case' button.