

## FAQs FOR CONSERVATORS

<b>Q.</b>	How can I see my transactions organized by category for my account?
<b>A.</b>	Go to the “Review and Submit” tab, click on “Print.” The print preview will open. Scroll to the end of the report. There, all transactions are organized by category.
<b>Q.</b>	How can I make using MMC easier?
<b>A.</b>	Enabling an “auto complete,” “auto fill” or similar feature in your browser will offer matching entries to expedite entry of transactions that are entered on a regular basis. (This feature may not work well on the login page, however.) Entering transactions monthly or at other regular intervals throughout the year will make the job more manageable. Work only from your financial statements (not check registers) and compare your balances frequently. Stop, identify and correct any mistake as soon as your report does not agree with your financial statement.
<b>Q.</b>	What do I do with the personal property assets that are less than \$500?
<b>A.</b>	If the protected person has clothing and other household goods that individually have a value of less than \$500 but combined equal or exceed \$500, use the combined household goods category in personal property and enter the items together. Other “like” items may be similarly grouped to total \$500 or more, for example, antiques, jewelry, collections. If the assets even combined are not worth at least \$500, do not include them on your report.
<b>Q.</b>	I use an “auto fill” feature in my browser so I can see that my correct email is showing up, why do I get an error message when I try to sign in?
<b>A.</b>	Using auto fill or auto complete features on the login page can cause error messages and may not be recognized by the program. Retype the required information in the field(s).
<b>Q.</b>	How do I show payments made to reduce a debt that has been identified as a financial account within my report?
<b>A.</b>	Payments must be reported as a “transfer” from the account where the funds came from to the debt account. From the Income and Expenses tab, go to the account the payment was made <u>from</u> , enter a “transfer” transaction to the debt account. (See further details in the user manual or in the posting for the 11/12/14 update available on the website.)
<b>Q.</b>	How do I indicate that my report is a final account (my appointment has ended)?
<b>A.</b>	A question in the submit sequence will ask if your report is a final account. A “yes” response to this question will put the “Final” label on the account and allow you to indicate why it is a final account and insert an end date.
<b>Q.</b>	There is a place for the conservator to enter account numbers on the inventory, do I still need to file a confidential form 11.2?
<b>A.</b>	Account numbers are masked within the program and do not appear on any reports filed with the court, thus the Rule 11 forms are not required <u>unless</u> you are filing other documentation containing this information with the court. <b>DO NOT ENTER ACCOUNT NUMBERS IN ANY OTHER FIELDS IN MMC.</b> Statements that are uploaded as supporting documents in MMC are NOT filed with the court. They stay within MMC for review purposes only.
<b>Q.</b>	I’m changing designated agents. How do I make this change in MMC?
<b>A.</b>	Disable the old agent by unchecking the box “Enable designated agent.” Allow the new agent to connect by re-enabling the designated agent feature. You do not need to wait between these steps.

<b>Q.</b>	I have used the 'Miscellaneous Expense' category 12 times and on the 13 <sup>th</sup> time MMC creates an error. How can this be resolved?
<b>A.</b>	You can only use 'Miscellaneous Expense' 12 times per annual report. Review your transactions and pick the most appropriate alternate category from the drop down.
<b>Q.</b>	Why can't I see the tab to enter Income/Expenses in my report?
<b>A.</b>	You are still in the Inventory report in MMC. Enter all beginning assets and submit the inventory and then you will be able to proceed with the annual accounting which provides the Income and Expenses tab.
<b>Q.</b>	How do I record a transfer of funds between accounts?
<b>A.</b>	From the Income and Expenses tab, go to (click on) the account the money was transferred <u>from</u> , enter a "transfer" transaction to the "transfer to" account. (See further details in the posting for the 11/12/14 update available on the website or the user manual.) You cannot make transfers from debt accounts. You cannot edit transfers, you must delete and start over.
<b>Q.</b>	I entered my surety bond information on the inventory and it does not show up on the annual account, how do I edit the bond amount?
<b>A.</b>	The bond question appears on each report during the submit process. If your bond information is not showing correctly, enter the correct information each time you submit a report. The court will need to change the information in the court case management system for the information to automatically show on your report. Until the court makes that change, you will need to make the addition on your account. You may follow up directly with your court if you do not see that change being made.
<b>Q.</b>	I am also the guardian on my case. How do I prepare my annual Personal Well-Being Report?
<b>A.</b>	This report is not a part of the MMC program. The form to prepare this report is available at <a href="http://www.mncourts.gov/forms">www.mncourts.gov/forms</a> . Print the form and file it on paper with the court.
<b>Q.</b>	When I view/print my report, the entire page is not visible and/or pages are missing.
<b>A.</b>	This can usually be resolved within your print preview dialog box by selecting "Shrink to Fit" and/or "Shrink Oversized Pages" or similar options. For other options, consult your printer manual or help feature.
<b>Q.</b>	How do I enter a transaction for no dollars, just cents?
<b>A.</b>	Enter zero (0) in the dollar space, period and then the cents. Example: 0.27
<b>Q.</b>	How do I determine who the 'interested persons' are for service of my reports?
<b>A.</b>	Interested persons are defined by Minnesota Statute at: <a href="#">M. S. 524.5-102 - See Subd. 7.</a>
<b>Q.</b>	I've received an automated notification reminding me of my report coming due, but I've already submitted my account.
<b>A.</b>	MMC may continue to send the reminder based on the period end date even if you've already submitted your account. Unless you are filing a final account, you've submitted your report prematurely. You should wait until <u>after</u> your period end date to submit your report in the future. Your report should always reflect the balances <i>at close of business on your period end date</i> . You need to wait until that date to confirm what those balances are on your financial statements.
<b>Q.</b>	When I put in an expense transaction for a check, the check number field is not visible or is barely visible.
<b>A.</b>	Some browsers display the check number field too far to the right. After selecting the "check" option, [ <i>tab</i> ] to the check number field and the box will be displayed.

<b>Q.</b>	The fee question in the submit sequence requires an hourly fee amount. I charge a flat fee, not hourly. How do I answer this question?
<b>A.</b>	Average your time to determine an approximate hourly fee and put that in your answer.
<b>Q.</b>	How much detail is required for reporting on-going gains and losses on investments?
<b>A.</b>	It is not necessary to report monthly/quarterly gains or losses, or detailing dividends, fees, etc. for investment accounts. As long as the funds stayed within the account or portfolio even if different stocks were bought and sold, just report value changes as a net gain (Asset Appreciation) or net loss (Asset Depreciation) using the statement closest but prior to the period end date of your report. If money was distributed from the investment, report that as a transfer from the investment account to the receiving account. If money was added to the investment from another account, report that as a transfer from that account to the investment account. If dividends are issued and deposited into a financial account other than that investment account, enter those as income transactions (Investment – Dividends) in that other account.
<b>Q.</b>	What is required to be uploaded as supporting documentation to my report in MMC?
<b>A.</b>	The minimum documentation includes financial statements for each financial account for the entire reporting period. Optional would be additional receipts, contracts, statements, memos, etc. that help explain the transactions or provide additional detail. If your account is audited, you will be contacted by someone from the Conservator Account Auditing Program (CAAP) to provide those additional documents if they are not uploaded. Someone from the Conservator Account Review Program (CARP) may also contact you to provide specific documentation related to particular questions that come up in the review of your report. Documents may be uploaded both before and after submitting the report. Documents must be in .pdf format.
<b>Q.</b>	My supporting documents are in .pdf format, but they will not upload. How can I resolve this?
<b>A.</b>	Check the size of the document. Keeping the document at around 4MB will help ensure a successful upload. You may exceed that size slightly if you have very fast internet. The slower your internet connection, the smaller the file needs to be to prevent the upload from timing out. Split the document as necessary to reduce the size.
<b>Q.</b>	The court gave me an extension to file my report, why do MMC notifications continue to say the report is overdue?
<b>A.</b>	Extensions from the court are not reflected in MMC. The program continues to see the report as overdue from the original due date. If you've gotten an extension from the court, comply with their instructions.
<b>Q.</b>	I was appointed first as an emergency conservator and later as a general conservator. What reports are required of me?
<b>A.</b>	Unless your court has specifically instructed otherwise, the statewide best practice in this scenario is to require an inventory as of the time of the initial emergency appointment and then an accounting that continues through the one year anniversary from the general appointment. Your first accounting will cover both the emergency period and the first full year of your general appointment.