



MyMN Conservator (MMC) User Manual for Conservators

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(MJB_SP_1063b)

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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.
- Conservator reports, 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 submits a report, judgments and bond information from MNCIS populate the annual account, and are available on the account report for the judge to review.
- Professional conservators are able to assign cases to employees and add or remove employees in MMC.
- Conservators can enable a designated agent within MMC without having to submit a paper document.

Resources

There are several resources available on the <http://www.mncourts.gov/conservators> 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)
- [Resources for Conservators](#) (manuals, FAQs, etc.)

For Assistance

Contact the Court Administrator's Office, Probate Division of the District Court in which the case is filed to determine which reports are due, when they are due, or to request an extension.

Contact the Conservator Helpline (tel: 763-279-0176) for assistance with MMC.

Terms

Account Examination Report - Documentation of review of a filed account completed by court staff.

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.

CAAP Audit Report – A report to the court that the CAAP auditor completes that contains findings and recommendations based on the audit.

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.

Financial Statements – Bank and other statements such as brokerage, investment statements, etc., that reflect the changes in value of financial assets at a given time.

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.

Interested Person –see [MN Statute 524.5-102 Subd. 7. Interested Person](#)

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

Letters of Conservatorship – A legal document signed by the judge that gives you authority as conservator of the protected person.

MMC – MyMNConservator: An online program for conservators to complete and file their reports electronically.

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

Professional Conservator – A person acting as guardian or conservator for three or more individuals not related by blood, adoption, or marriage.

Protected Person – The person for whom a conservator has been appointed.

Ward – The person for whom a guardian has been appointed.

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. 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

Resources

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

For information about preparing for an audit review: [Audit Tip Sheet.pdf](#).

About this Document

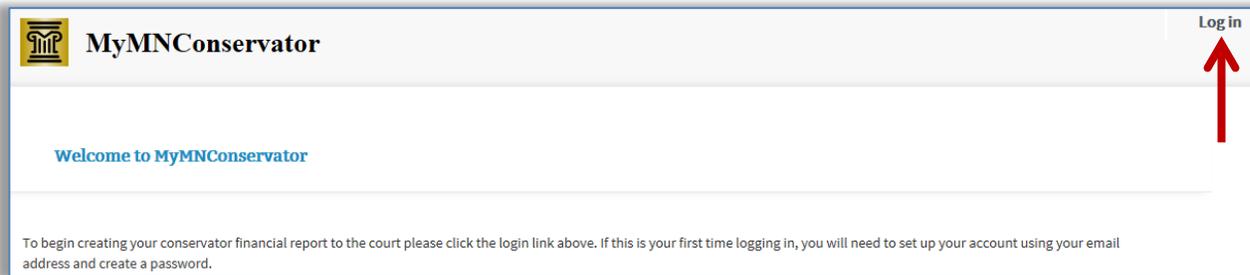
This document is available on the state court website under MyMN Conservator (MMC) > [Resources for Conservators](#). It provides instructions to users on how to enter information in the MMC system. This document is not intended to instruct users on what information to enter. Due to the complexities 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 MMC via MyCourtMN

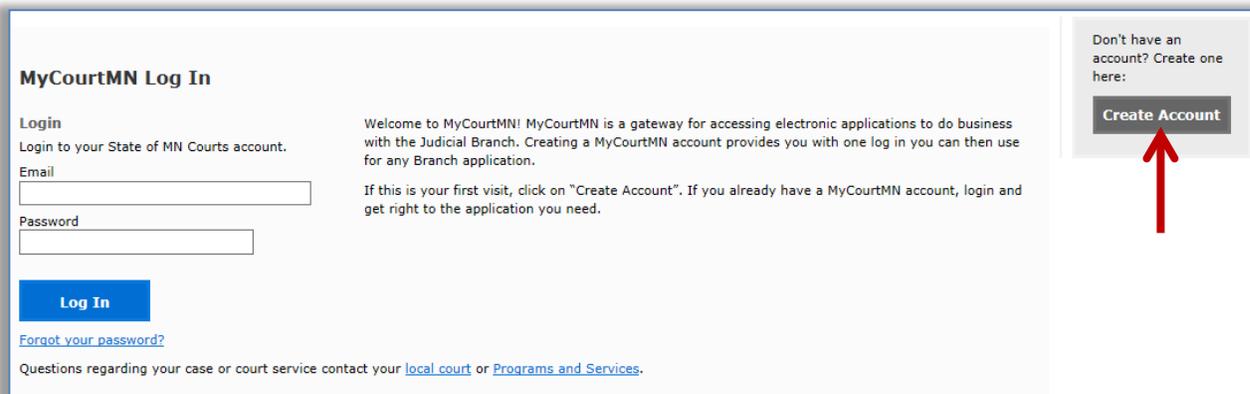
A valid email address is needed to log into the MMC system.

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.



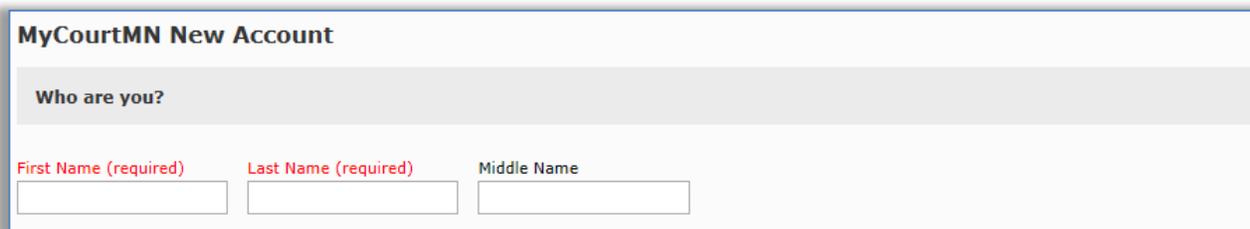
Creating a MyCourtMN Account

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 and phone number.

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.

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. Please note that your answer is case-sensitive and will require an **exact match** to reset your password.

Question 1

Answer

Question 2

Answer

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.

Note:
The strength of the password registers on the screen; you will need a good or strong password in order to proceed.

- c. Retype the password for confirmation.

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: Good

Confirm Password

7. Click on and read the Terms of Service.

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

Confirm your changes

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

Save **Cancel**

- 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.

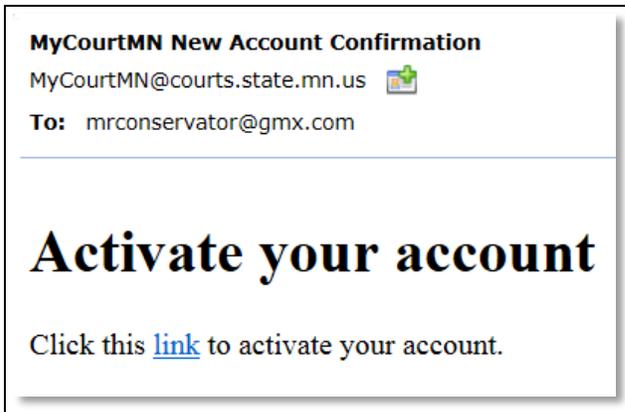
Activating your Account

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

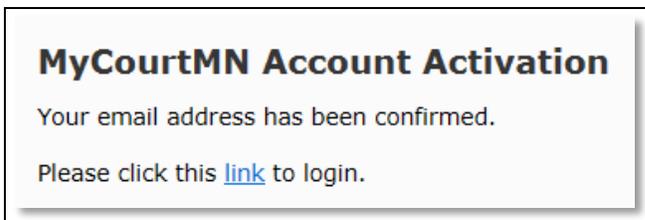
Tip:

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

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



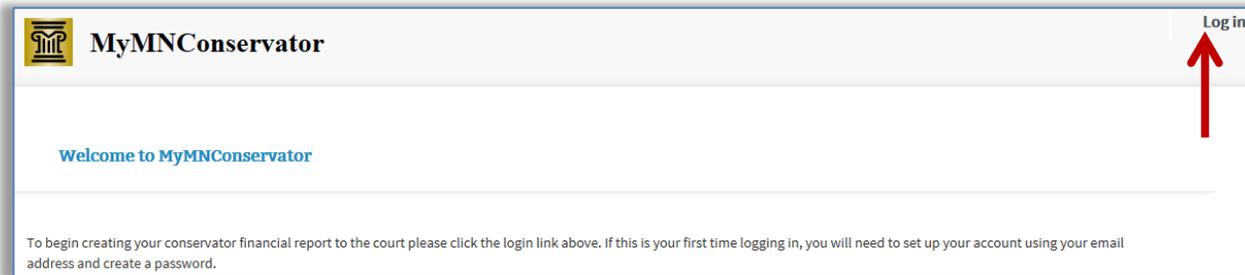
- A web page opens indicating your email address has been confirmed.



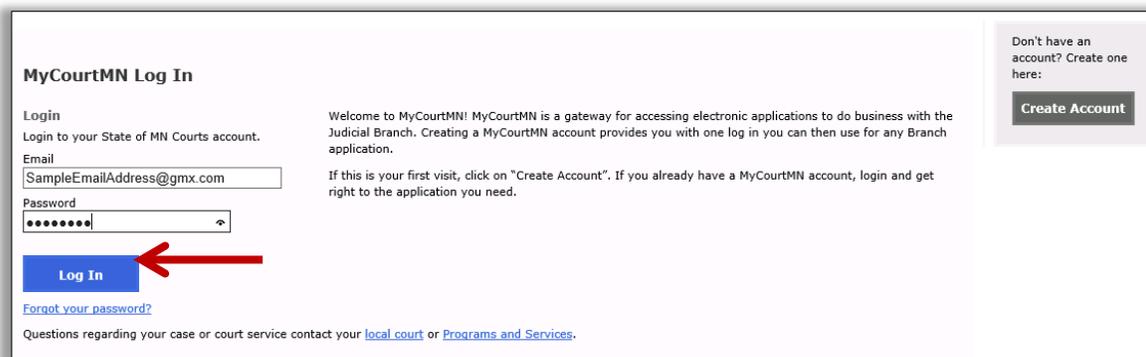
- Click the link to login.

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.



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



2. Click **Log In**.

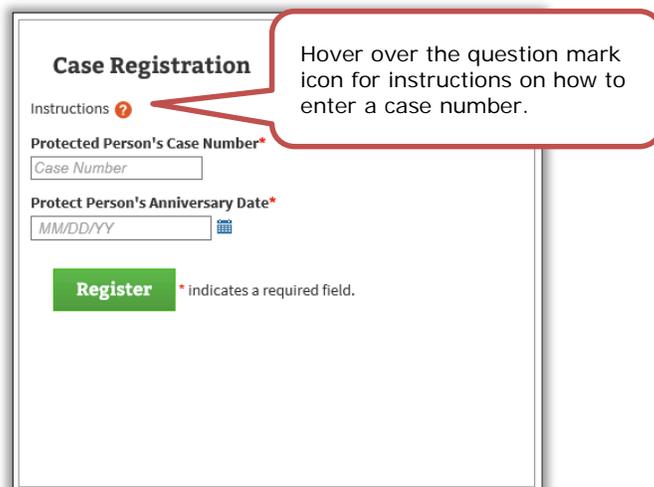
First Time Case Registration

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.
 - 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

- Use the date your Letters of Conservatorship were issued by the judge.
- If you have previously filed reports on paper or in the old CAMPER program, your anniversary date should be the period end date on the last report filed or the date provided to you by the court where your case is filed for starting reports going forward in MMC.

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 Cate Conservator!' and 'UPDATE LOGIN'. Below this are three tabs: 'Protected Person(s)', 'Notifications', and 'Reports'. A 'Filter' box is present under the 'Protected Person(s)' tab. A 'Conservator(s)' sidebar on the left shows 'Cate Conservator' with an 'Edit' button. The main table has columns: 'Protected Person(s)', 'Current Report', 'Case Number', 'Anniv Date', and 'Assigned To'. A single record is shown for 'Protected, Patty' with a report 'Inventory Report (New)', case number '02-PR-15-272', and anniversary date '07/01/2016'. The assigned user is 'You'. A pagination bar at the bottom shows 'Previous', '1', 'Next', and 'Last'. Four callouts provide instructions: 1. 'Help video applicable to this screen.' points to a 'Dashboard Tutorial' link. 2. 'In the Filter field, enter a name or file number to search for an account.' points to the filter box. 3. 'Click any text in blue to access that information.' points to the 'Protected, Patty' link. 4. 'Click an arrow in the headings to sort the columns.' points to the sort arrows in the table headers.

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).

Viewing Report History

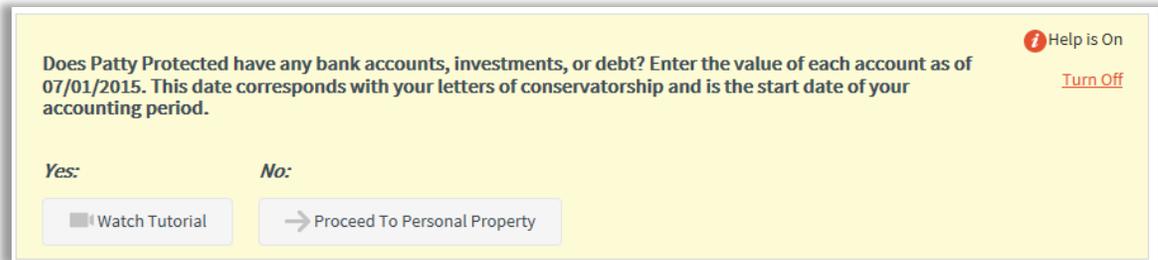
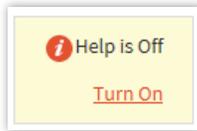
From the Dashboard, click the Protected Person's name hyperlink, which will take you to the Report History tab showing a list of reports for the case. The following statuses will appear next to the report:

- **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 but the court examination is not complete.
- **Audit Queue** The account is in the audit queue.
- **Closed** The account has been submitted and the court review or audit process is complete.

Both the Annual Account and the Final Account indicate "Submitted" if it is in the court queue awaiting review. The status "Audit Queue" appears right away if the Annual Account or Final Account has gone to the audit queue. When either the court review or the audit is completed, the status shows as "Closed." The Inventory Report shows as "Closed" right away, because it does not go through any kind of review process.

Online Help

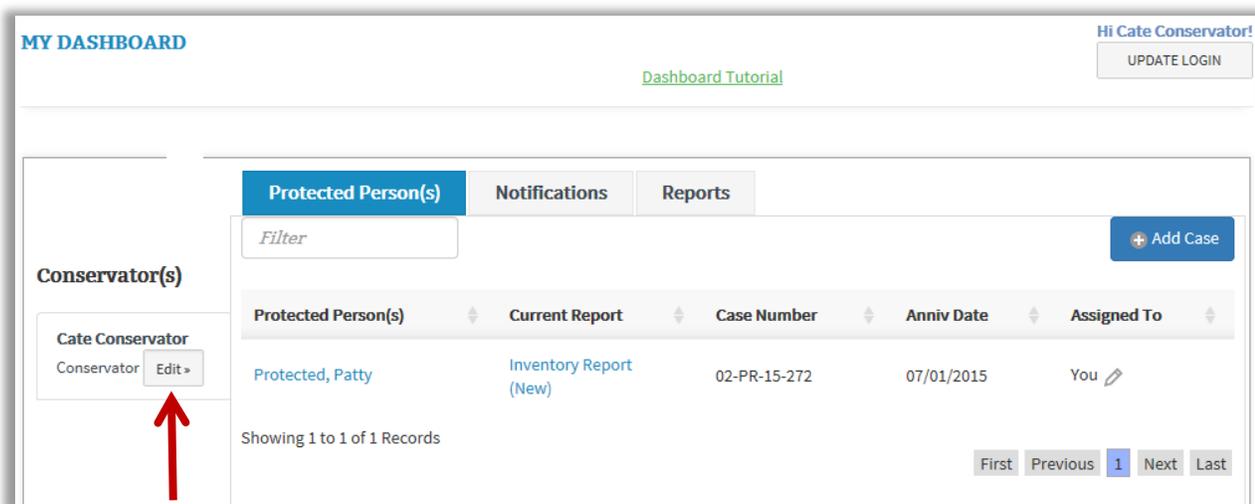
- MMC contains help text and short videos to assist conservators in working with the application. These resources are located at the top of most screens within MMC. If you would like to turn on or off the Help feature, click the corresponding links shown below.



- In some areas a question mark icon will appear.  When you see this icon, hover over it to access the quick help feature and additional information about the system will appear.

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**.



1. From the Conservator Profile page, enter your address information.

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).

2. Change whether you would like to receive alerts and/or notifications by checking or unchecking the applicable checkbox. (The checkboxes are checked by default.)
3. Click **Save Changes**.
This updates the address in MMC and also in the court file management system (MNCIS).

Notes:

If your name is legally changed you will need to contact the court where your case is filed. Your legal documents will also need to be changed. Follow instructions given by the court to prove your name change and have your Letters of Conservatorship amended.

Conservator Profile

Name
Cate Conservator

Phone

Phone Number

Address ?

Street No*	Direction	Street Name*	Street Type	Direction
<input type="text" value="Street No"/>	<input type="text"/>	<input type="text" value="Street Name"/>	<input type="text" value=""/>	<input type="text" value=""/>
Unit Type	Unit No	City*	State*	Zip Code*
<input type="text" value=""/>	<input type="text" value="Unit No"/>	<input type="text" value="City"/>	<input type="text" value=""/>	<input type="text" value="Zip Code"/>

Email Addresses

cateconservator@gmail.com

Add

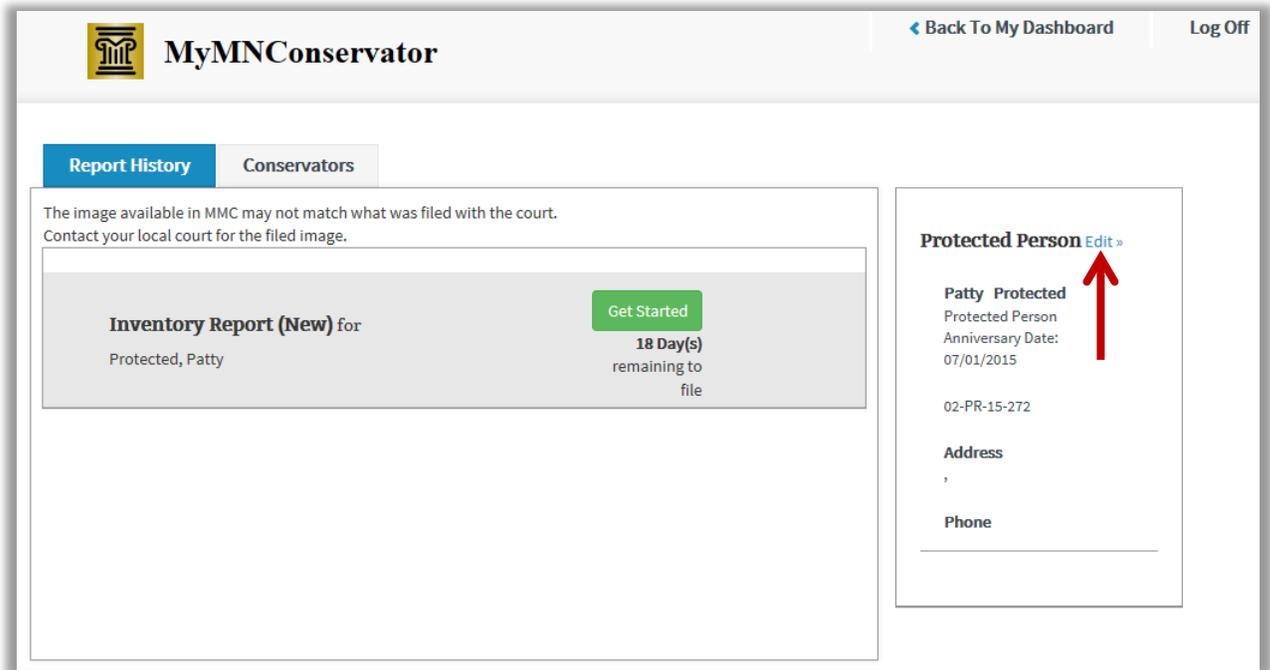
Email Notifications

Receive Alert Emails Push Notifications

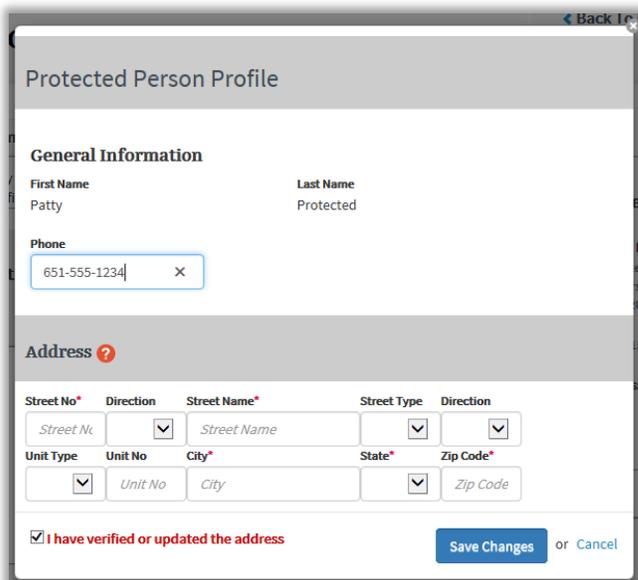
Save Changes or [Cancel](#)
* = Required

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** by the protected person's name.

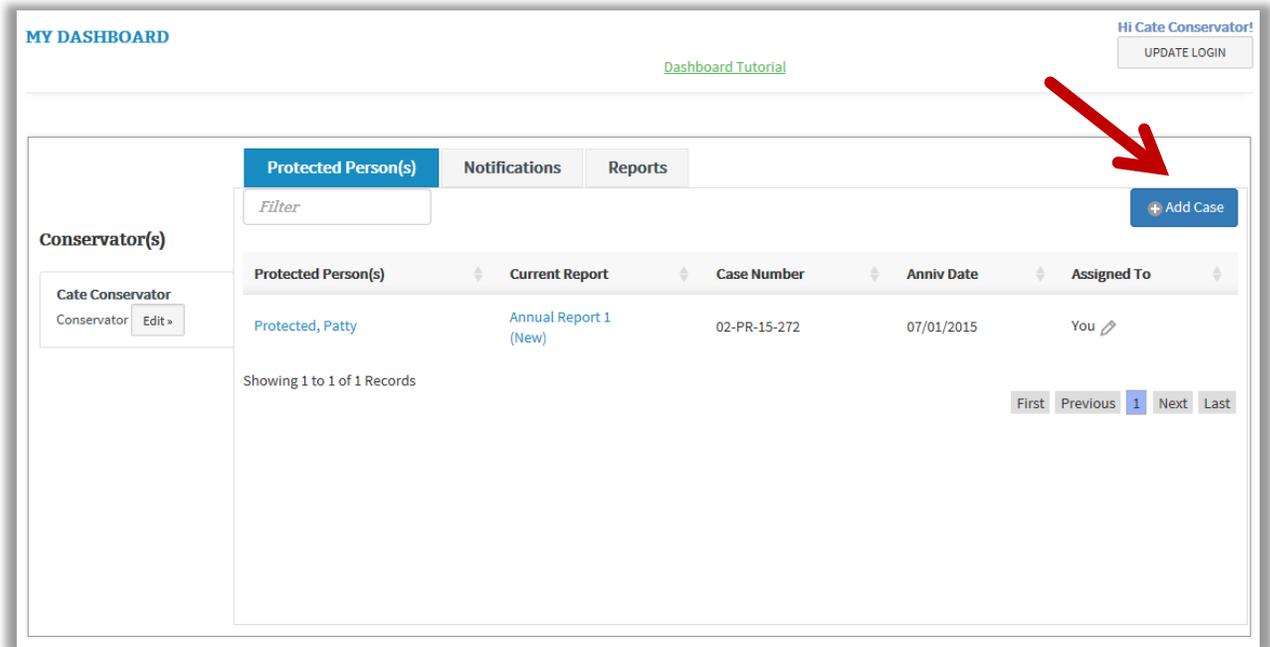


3. Enter the phone number and address information.
 - a. Enter the information where the Protected Person actually lives, not your information.
 - b. Once you check that you have verified or updated the address, the Save Changes button becomes available.
4. Click **Save Changes**.
The Protected Person's address will be saved in MMC, as well as MNCIS.

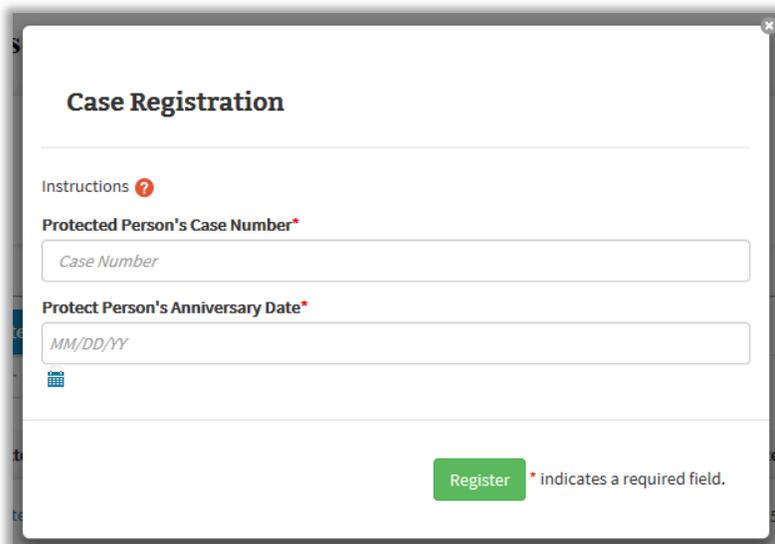


Adding Additional Cases

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 for [registering a case](#) at the end of the Getting Started section of this manual.



Notifications

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

- 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 CAAP auditors about accounts that are under review
- Notification that a report has been opened for amendment



MyMNConservator

Your Annual Accounting is due today. Please complete the accounting and submit it to the court today.



MyMNConservator

Your Annual Accounting is overdue. Please complete the accounting and submit it to the court today. Your failure to comply may result in a court hearing on the matter.

Notes:

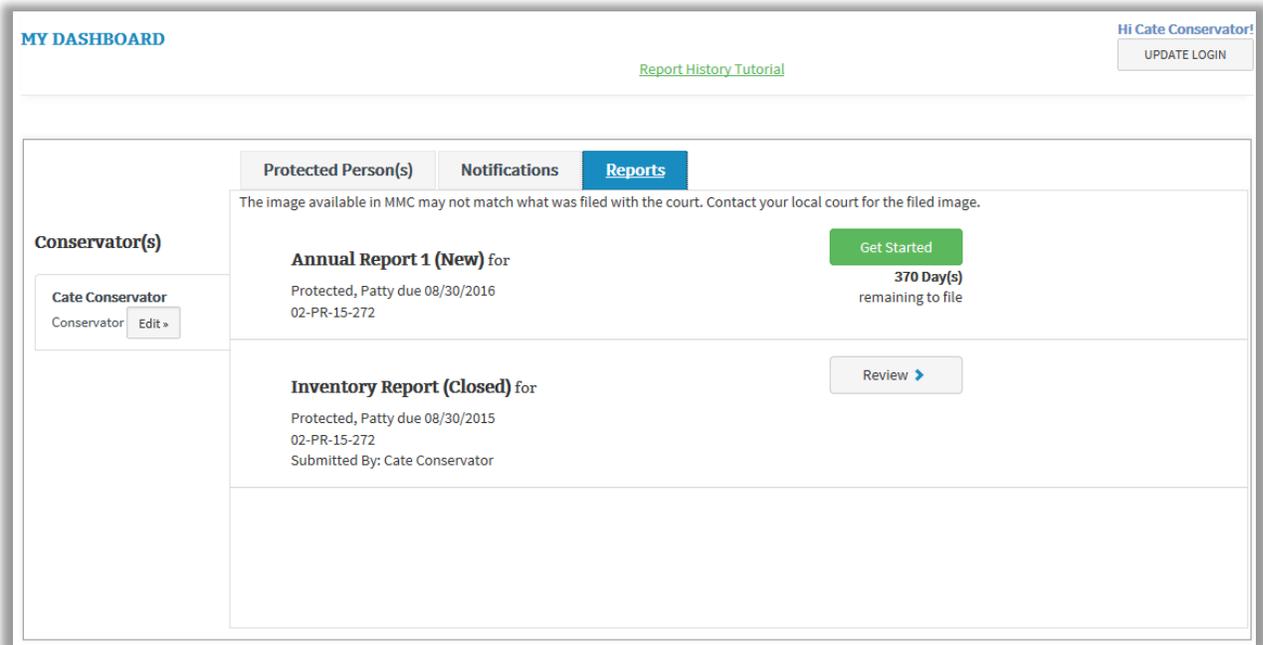
You may click the "x" in the message box to delete the message(s) after you read them.

Reports

Overview

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**.



Inventory Report

For Newly Appointed Conservators

To start an Inventory Report, from the Dashboard, Protected Person(s) tab, in the Current Report column, 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 a Financial Account

Identify all financial accounts belonging to the protected person that you control as conservator. Accounts outside the conservatorship, such as trusts, should not be included. Outstanding debt accounts, such as credit cards and loans other than mortgage, should also be listed. Identify each account and the type. The account types available are:

- Checking Account (Bank Account)
- Savings Account (Bank Account)
- CD (Investment)
- Credit Card (Debt)
- Corporation Stock (Investment)
- Bond (Investment)
- IRA (Investment)
- Annuity (Investment)
- PrePaid Burial (Investment) (cash value if revocable; death benefit value if irrevocable)
- Life Insurance (Investment) (cash value only)
- Other-Investment (Investment)
- Loan-Not Mortgage (Debt)
- Mutual Fund (Investment)
- Brokerage (Investment)
- Other Debt-Not Mortgage (Debt)
- Accrued Fees-Guardian/Conservator (Debt)
- Accrued Fees-Attorney (Debt)

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

PATTY PROTECTED INVENTORY REPORT
Period: 7/1/2015
17 Days To File Last Updated No Updates

CASE NUMBER: 02-PR-15-272

[Previous CAMPER Data](#) [Upload a File Tutorial](#)

Financial Accounts

Personal Property

Real Estate

Review & Submit

Does Patty Protected have any bank accounts, investments, or debt? Enter the value of each account as of 07/01/2015. This date corresponds with your letters of conservatorship and is the start date of your accounting period.

Help is On
[Turn Off](#)

Yes:

 Watch Tutorial

No:

Files: *There are currently no files uploaded.*

All Accounts

All accounts for Patty Protected. Add current balances of accounts as of 07/01/2015.

2. Enter the account name. This should identify the name of the bank or company, not the name of the protected person. If you have multiple accounts with the same bank, make the name unique for each account. For example: Bank Name 1, Bank Name 2 –or- Bank Name Checking, Bank Name Savings. You will not be able to enter multiple accounts with the same 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.

Note:
 If you are not a new conservator and have previously filed paper reports or reports through CAMPER, your inventory should match the ending list of assets on the last report filed with the court including financial accounts, personal property (if at least \$500 in value) and real estate.

5. Enter your account number. (Account numbers are protected and will not appear on your report.)

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.
 - c. On the left-hand side of your screen you will note that the numbers in parenthesis change, indicating the number of account types you have entered.

Account Name	Type	Value
MN Bank - 1	Savings	\$5,000.00
MN Bank - 2	Checking	\$1,500.00

Financial Assets: **\$6,500.00**

+ Personal Property: **\$0.00**

= Bondable Assets: **\$6,500.00**

Bondable Assets: **\$6,500.00**

- Debt (not including real estate): **\$0.00**

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, valuable 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, or when combined, have a total value of \$500 or greater.

Note:

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

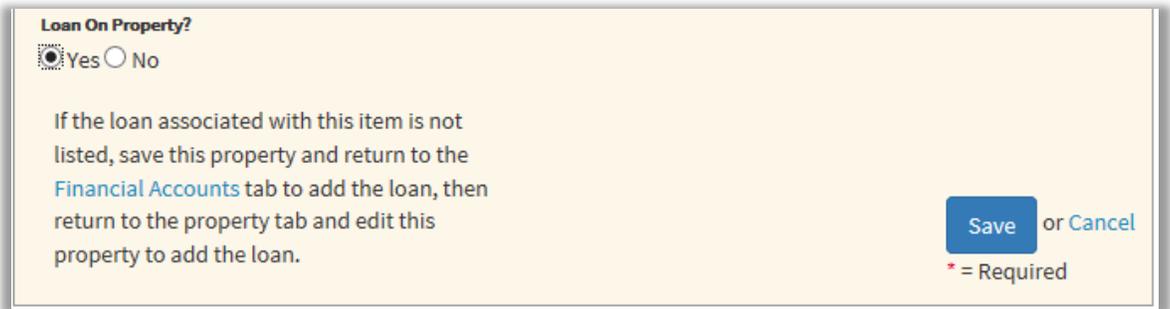
The screenshot shows the 'Personal Property' tab selected in a navigation bar. Below the navigation bar is a yellow survey box with the following text: "Does Patty Protected have individual jewelry items, precious metals or coin collections, collections with a total value greater than \$500, antiques, furs, art, individual furniture and household goods that have a total value greater than \$500? Does Patty Protected have a vehicle, boat, recreation vehicle, RV, or Motorhome?". There are two columns of options: "Yes:" with a "Watch Tutorial" button, and "No:" with a "Proceed To Real Estate" button. To the right of the survey box is a "Help is On" icon and a "Turn Off" link. Below the survey box is a "Files: There are currently no files uploaded." message and an "Upload a File" button. At the bottom of the section are "All Personal Property" and "Add Property" buttons, and an "Export Property" button.

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**.

The screenshot shows the 'All Personal Property' form. On the left is a sidebar with 'Account Types' including 'All Personal Property (0)', 'Valuables (0)', 'Vehicles (0)', and 'Others (0)'. The main form area has a 'Description*' field with a cursor, a 'Value*' field with '\$' and '0', a 'Type' dropdown menu set to 'Antiques', and a 'Loan On Property?' section with radio buttons for 'Yes' and 'No' (where 'No' is selected). There are 'Save' and 'Cancel' buttons, and a note '* = Required' at the bottom right. At the top right of the form are 'Add Property' and 'Export Property' buttons.

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.](#))

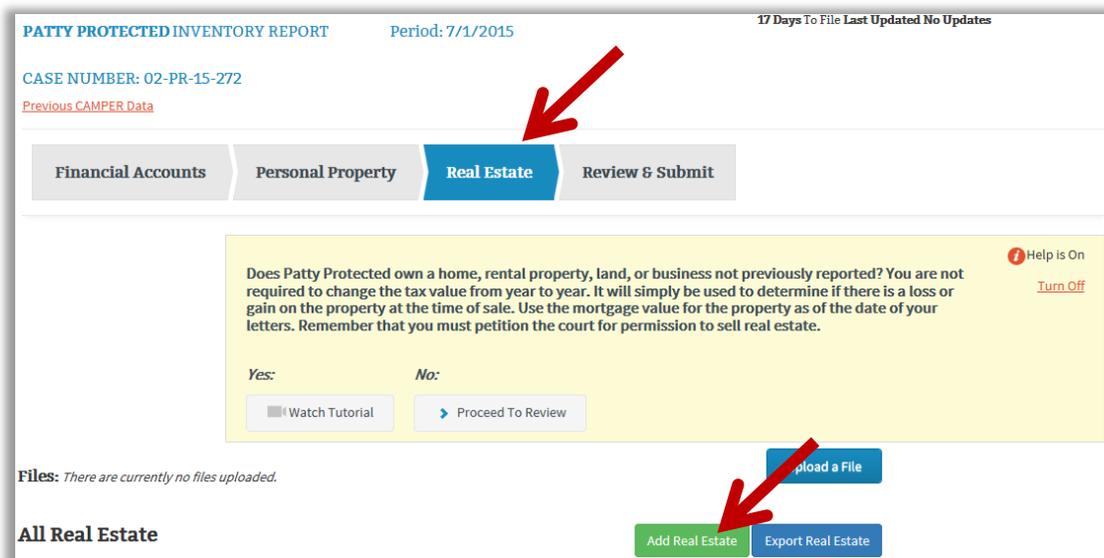


- c. Once you have added the loan return to the Personal Property tab, click **Edit** for the property to which you need to add the loan. Click **Yes** to loan on property if it is not already checked and connect the loan.
6. Click **Save**.

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. You must petition the court for permission to sell real estate. If there is a mortgage, use the mortgage balance as of the date of your Letters of Conservatorship.



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

Description*	Real Estate Type	Tax Value*
<input type="text"/>	Homestead <input type="button" value="v"/>	\$ 0
Is there a mortgage on the property?		Tax Year
<input checked="" type="radio"/> Yes <input type="radio"/> No		2015 <input type="button" value="v"/>
Current Mortgage Amount	Mortgage Interest Rate	Mortgage Payment
\$ 0	0 %	\$ 0
Is there rental income?		
<input checked="" type="radio"/> Yes <input type="radio"/> No		
Monthly rental income*		
\$ <input type="text"/>		
Are there any liens or encumbrances on the property?		
<input checked="" type="radio"/> Yes <input type="radio"/> No		
Description*	Total Amount*	
<input type="text"/>	\$ <input type="text"/>	

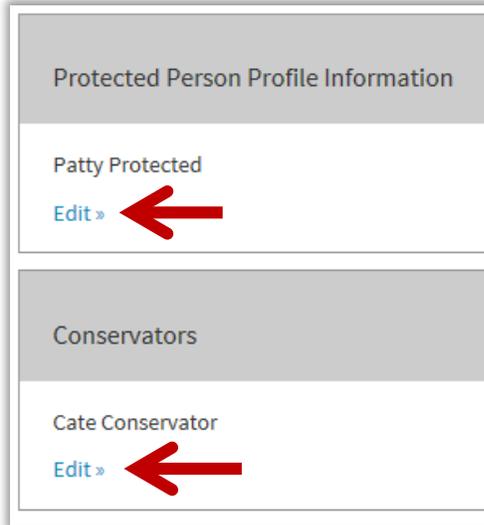
or
* = Required

- In the Description field, enter the address or brief location description (not the legal description).
- Select the real estate type from the drop-down.
- Enter the value from the latest tax statement.
- Enter the year of the tax statement.
- Indicate if there is a mortgage on the property.
 - If there is a mortgage on the property click **Yes**.
 - Enter the current mortgage balance from the statement closest to your anniversary date.
 - Enter the interest rate from the mortgage statement.
 - Enter the monthly payment from the mortgage statement.
- Indicate if there is rental income on the property.
 - If there is rental income, click **Yes**.
 - Enter the monthly income that is usually received.
- Indicate if there are liens on this property.
 - If there are liens on this property click **Yes**.
 - In the Description field, enter the lien holder name(s) and the amount of the lien(s).
 - If there is more than one lien, combine the values.
- Click **Save**.

Review and Submit Tab

Editing Information

- Ensure your contact information (address and phone number) is up to date before submitting your report. At any time, you can click on any tab and edit information until your report is submitted.



Previewing and Printing the 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. Use the print option in your browser.

Using Print Preview in MMC

If the entire report is not viewable using the Print Preview option, change the settings in the Print Preview header to **Shrink To Fit**.



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.

PATTY PROTECTED INVENTORY REPORT Period: 7/1/2015 17 Days To File Last Updated No Updates

CASE NUMBER: 02-PR-15-272
 Previous CAMPER Data [Inventory Review and Submit Tutorial](#)

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

Report Information Due Date 8/30/2015 County Anoka Judicial District 10th District	Protected Person Profile Information Patty Protected Edit > Conservators Cate Conservator Edit > Overview Total Inventory Balance \$0.00	Submit Print Financial Assets: \$0.00 + Personal Property: \$0.00 <hr/> = Bondable Assets: \$0.00 Bondable Assets: \$0.00 - Debt (not including real estate) \$0.00
---	---	---

To submit your report to the court, click **Submit** and respond to the subsequent series of questions. If you click out of the submit process, you will start again at the first question when you return.

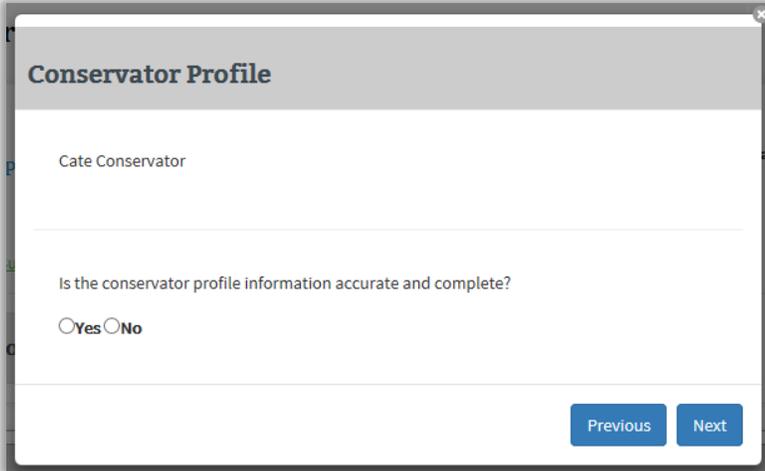
1. Indicate if you are a Professional conservator.
 - a. A professional conservator is defined as someone appointed for three or more protected persons that are not related to the conservator.

Professional

Are you a professional conservator? Yes No

Next

2. Indicate if your conservator profile is accurate and complete (it should show your current address).
 - a. If your conservator profile is inaccurate/incomplete, you must return to the summary page and correct the profile information.



Conservator Profile

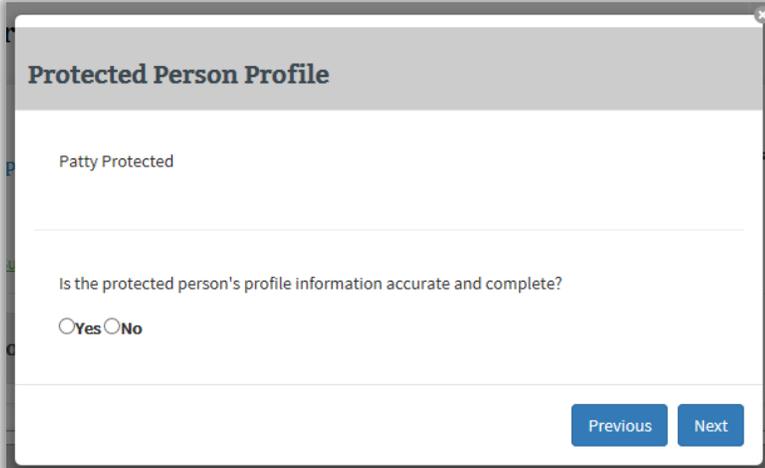
Cate Conservator

Is the conservator profile information accurate and complete?

Yes No

Previous Next

3. Indicate if the protected person's profile is complete (it should show the current address).
 - a. If your protected person profile is inaccurate/incomplete, you must return to the summary page and correct the profile information.



Protected Person Profile

Patty Protected

Is the protected person's profile information accurate and complete?

Yes No

Previous Next

- 4. 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.

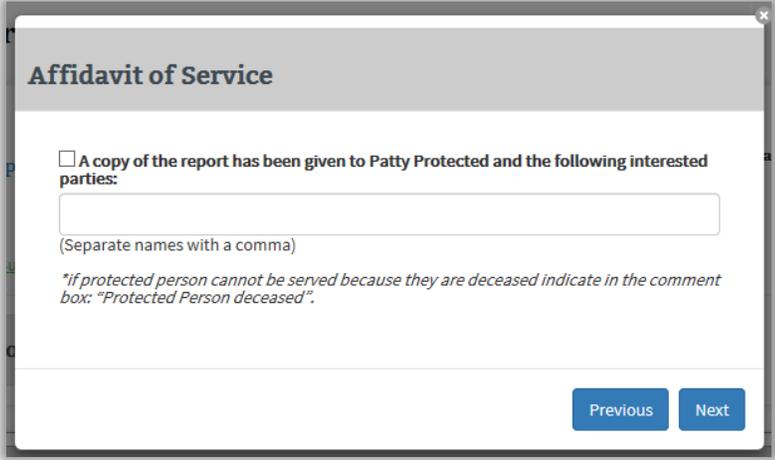
Are there any bonds? Yes No

Company	Amount
<input type="text"/>	<input type="text"/>

Is the above information concerning the bond(s) correct?
 Yes No

Please provide correct bond information:

5. Indicate that you have provided service of the inventory.
 - a. By checking this box, you confirm that you have provided a copy of the inventory to the protected person and any interested parties.
 - b. In the text field, enter the names of all interested parties that were served. Separate the names with a comma.



Affidavit of Service

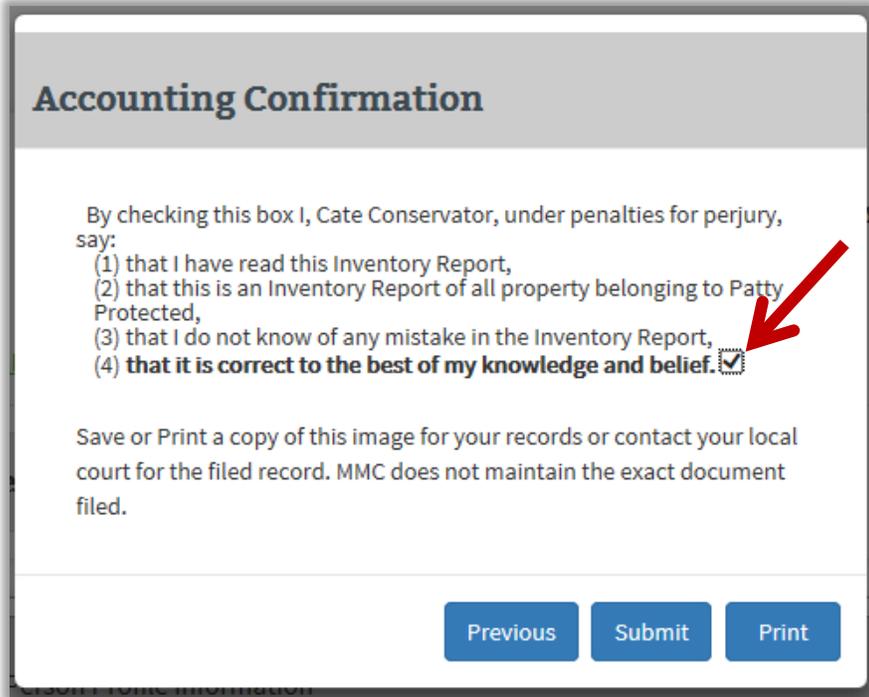
A copy of the report has been given to Patty Protected and the following interested parties:

(Separate names with a comma)

**if protected person cannot be served because they are deceased indicate in the comment box: "Protected Person deceased".*

Previous Next

6. 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.



Accounting Confirmation

By checking this box I, Cate Conservator, under penalties for perjury, say:

- (1) that I have read this Inventory Report,
- (2) that this is an Inventory Report of all property belonging to Patty Protected,
- (3) that I do not know of any mistake in the Inventory Report,
- (4) **that it is correct to the best of my knowledge and belief.**

Save or Print a copy of this image for your records or contact your local court for the filed record. MMC does not maintain the exact document filed.

Previous Submit Print

7. 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. If you opt to print the report, you must still return to this question to submit the report.

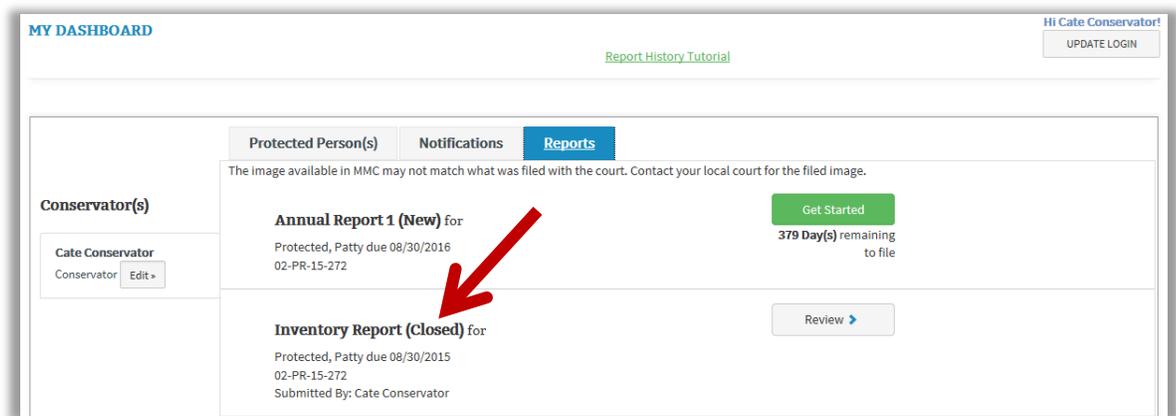
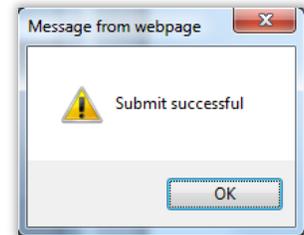
a. If you leave and return to the inventory, you will need to go through the submit process again.

8. Click **Submit** to file your inventory with the court. This may take a few minutes.

9. You will receive a verification message indicating your submission was successful.

a. If your inventory was successfully submitted, it will be sent to the court.

i. You may confirm this by returning to the Reports tab on your dashboard. Beside "Inventory Report", it will indicate **Closed**.



b. If your inventory failed to send:

- i. Check your internet connection. If your internet connection is ok, try to re-submit.
- ii. Log out and check the Welcome page for announcements indicating if MMC is currently unavailable. Return to the program after it becomes available again.
- iii. 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.

10. You may now return to your dashboard to start the next report or log off.

Annual Account Report

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 information is added to your report.

- **Bondable Assets:** All financial assets + 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 the financial account you are working on.
2. Click **Add Transaction**.

Note:

Work from your financial account statements, not from your check registers. Only transactions that have cleared the bank should be entered.

The screenshot shows the 'Income & Expenses' section for 'MN Bank - 1 Savings'. At the top, there are navigation tabs: 'Financial Accounts', 'Income & Expenses' (selected), 'Personal Property', 'Real Estate', and 'Review & Submit'. Below the tabs, there is a 'Files' section with the message 'There are currently no files uploaded.' and an 'Upload a File' button. A 'Help is Off' notification is also present. The main area contains a table with columns 'Date', 'Payment Type', 'Description', and 'Amount'. Above the table are buttons for '.CSV Upload', 'Add Transaction' (highlighted with a red arrow), and 'Export Transaction', along with links for '.CSV Help' and '.CSV Template'. On the right side, there is a summary of assets: 'Financial Assets: \$6,500.00', '+ Personal Property: \$9,000.00', and '= Bondable Assets: \$15,500.00'. A sidebar on the left shows 'Account Types' with 'MN Bank - 1 Savings' listed with a balance of \$5,000.00.

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.

First Previous Next Last of 0 pages Page Size 10 25 50

Date*	Description*	Amount*
08/26/2015	Payable to	\$ 0

Income
 Expense
 Transfer

Payment Type*
 Check

Check Number*

Category*

Account*
 MN Bank - 1 (Savings) \$5,000.00

or

* = Required

3. Enter the date.
4. Check Income or Expense.
5. Enter a Description for the transaction (e.g., from whom the money was received (received from), or to whom the money was paid (payable to)).
6. Enter the Amount.
7. 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.)
8. Confirm or select your account. (Once your account is selected, it will default to that account.)
9. Click **Save** or **Save and Add Another**.

Viewing Your Transactions

1. When you enter transactions, they will post in date order with the most current first. If you do not see the transaction you entered, make sure to check other pages. You can select the page you want to view from the numbers 1, 2, 3 etc., or you can click next, last, first, or previous. The application defaults to page one after each addition, edit, or deletion of a transaction. Make sure to click on the correct account on the left-hand side to see the transactions entered in that account.
2. When you view your transactions, you can choose to see 10, 25 or 50 transactions on a page. If you choose to view 10, the system should perform faster than if you choose 50, but you will have fewer pages to look through if you pick 25 or 50. Click the number of transactions you wish to view on a page. (The default is 10 transactions.)
3. If you entered some transactions directly within the application **and** some transactions by .csv upload, the transactions may show on different pages.

1. **First** Previous Next **Last** of 0 pages

2. **Page Size 10 25 50**

Date*	Description*	Amount*
08/1/2015	Cable Bill	\$ 150.00

Income
 Expense
 Transfer

Payment Type*

Check Number*

Category*

Account*

or

* = Required

To check your transactions, here are some other options:

- On the Income & Expense tab, Export transactions. This creates a spreadsheet with your transactions.
- On the Review & Submit tab, click Print for a print preview of all transactions by category.
- On the Review & Submit tab, scroll down the page until you see Income & Expense Overview.
 - Click the detailed overview and you can sort, search, and print your transactions. To sort your transactions, click on the double arrows in the column headers. To search, use the filter box.

INCOME & EXPENSE OVERVIEW
[DETAILED OVERVIEW](#)

Income & Expenses Detailed View Print

Filter

Date	Description	Account	Type	Number	Amount	Transaction
08/27/2015	Sold	MN Bank - 1	Savings		\$5,000.00	Personal Property Disposed
08/26/2015	Visa	Visa	Credit Card		(\$2,468.00)	Debt - Interest
08/26/2015	Savings	Trustone	Savings		\$9,842.00	Investment - Other
08/26/2015	Chase	Chase	Credit Card		(\$4,680.00)	Debt - Interest
08/26/2015	Target	MN Bank - 2	Checking		(\$100.23)	Food - Groceries
08/26/2015	July - Interest	MN Bank - 2	Checking		(\$24.68)	Debt - Interest
08/26/2015	Savings Account 2	Savings Account 2	Savings		\$500.00	Assets Omitted from Inventory/Account

Showing 1 to 7 of 7 Records

First Previous **1** Next Last

Entering Transactions for Debt Accounts

1. From the Income & Expense tab, under Account Types, click the debt account you are working on.

PATTY PROTECTED 1ST ANNUAL REPORT Period: 7/1/2015 - 7/1/2016 12 Months To File Last Updated 8/26/2015 2:27:15 PM

CASE NUMBER: 02-PR-15-272
[Export Transactions Tutorial](#)

Financial Accounts Personal Property Real Estate Review & Submit

Files: There are currently no files.
Chase Credit Card (\$4,680.00) Upload a File Help Is Off
[Add Another Account?](#) Add Transaction Export Transaction .CSV Help .CSV Template Turn On

Type	Description	Amount
Chase	Chase	(\$4,680.00)

Page Size 10 25 50

Financial Assets: \$16,342.00
+
Personal Property: \$9,000.00
= **Bondable Assets: \$25,342.00**

Bondable Assets: \$25,342.00
-
Debt (not including real estate) \$7,148.00
= **Net Balance: \$18,194.00**

Bondable Assets: \$25,342.00
+
Real Estate \$505,000.00

Account Types

- Chase Credit Card (\$4,680.00)
- MN Bank - 1 Savings \$5,000.00
- MN Bank - 2 Checking \$1,500.00
- Trustone Savings \$9,842.00
- Visa Credit Card (\$2,468.00)

- To enter a charge or expense:
 1. Click **Add Transaction** and enter an expense transaction similar to how you would with any financial account.
 2. Check **Expense**.
 3. Use the payment type **Debit or EFT** and select an appropriate category.
 4. Click **Save**.

Visa Credit Card [.CSV Help](#) [.CSV Template](#)

[\(Add Another Account?\)](#)

First Previous **1** Next Last of 1 pages Page Size 10 25 50

Date*	Description*	Amount*
10/29/2015	October + Late Fee <input type="text" value="X"/>	\$ 450.00

Income
 Expense
 Transfer

Payment Type*

Category*

Account*

or Cancel

* = Required

08/26/2015	Debit Or EFT	Visa	(\$2,468.00)
------------	--------------	------	--------------

- To enter debt interest:
 1. Click **Add Transaction** and enter an expense transaction similar to how you would with any financial account.
 2. Check **Expense**.
 3. Use the payment type **Debit or EFT** and select the Category **Debt – Interest**.
 4. Click **Save**.

Visa Credit Card [.CSV Help](#) [.CSV Template](#)

[\(Add Another Account?\)](#)

First Previous **1** Next Last of 1 pages Page Size 10 25 50

Date*	Description*	Amount*
10/29/2015	October + Interest	\$ 450.00

Income
 Expense
 Transfer

Payment Type*

Category*

Account*

or Cancel

* = Required

08/26/2015	Debit Or EFT	Visa	(\$2,468.00)
------------	--------------	------	--------------

- To enter a return for purchases on a credit card:
 1. Click **Add Transaction** and enter an income transaction similar to how you would with any financial account.
 2. Check **Income**.
 3. Select the Category **Refund**.
 4. Click **Save**.

Visa Credit Card [.CSV Upload](#) [Add Transaction](#) [Export Transaction](#) [.CSV Help](#) [.CSV Template](#)

[\(Add Another Account?\)](#)

Account Types

- Chase**
Credit Card
(\$4,680.00)
- MN Bank - 1**
Savings
\$5,000.00
- MN Bank - 2**
Checking
\$1,375.09
- Trustone**
Savings
\$9,842.00
- Visa**
Credit Card
(\$2,468.00)

First Previous **1** Next Last of 1 pages Page Size 10 25 50

Date*	Description*	Amount*
08/26/2015	Macy's Return	\$ 29.99

Income
 Expense
 Transfer

Category*
Refund

Use for tax, insurance, or other type of refund.

Account*
Visa (Credit Card) \$2,468.00

[Save](#) [Save and Add Another](#) or [Cancel](#)

* = Required

08/26/2015	Debit Or EFT	Visa	(\$2,468.00)
------------	--------------	------	--------------

Making Payments to Debt Accounts

1. From the Income & Expense tab, click the financial account you wish to make the debt payment *from*.
2. Click **Add Transaction**.
3. Check **Transfer**.
 - a. The Description will automatically indicate **Transfer From**.
4. Enter the payment amount.
5. Select the payment type **Debit or EFT** or **Check**.
6. From the **To Account** drop-down, select the debt account that was paid.
7. Click **Save**.

First Previous 1 Next Last of 1 pages

Page Size 10 25 50

Date*	Description*	Amount*
08/26/2015	Transfer From	\$ 250.00

Income
 Expense
 Transfer

Payment Type*

Debit Or EFT
▼

Account*

MN Bank - 2 (Checking) \$1,375.09
▼

To Account*

Chase (Credit Card) \$4,680.00
▼

Save
Save and Add Another
or Cancel

* = Required

Transfers between Accounts

Transfers are now made under the **Income & Expense** tab

1. From the Income & Expense tab, click the account you wish to transfer *from*.
2. Click **Add Transaction**.
3. Check **Transfer**.
 - a. The Description will automatically indicate **Transfer From**.
4. Enter the amount to transfer.
5. Select the payment type **Debit or EFT** or **Check**.
6. From the To Account drop-down, select the appropriate account you wish to transfer *to*.
7. Click **Save**.

MN Bank - 1 Savings

[.CSV Help](#) [.CSV Template](#)

[.CSV Upload](#) [Add Transaction](#) [Export Transaction](#)

[\(Add Another Account?\)](#)

Page Size 10 25 50

First Previous **1** Next Last of 1 pages

Date*	Description*	Amount*
10/29/2015	Transfer From	\$ 5000.00

Income

Expense

Transfer

Payment Type* Debit Or EFT

Account* MN Bank - 1 (Savings) \$10,000.00

To Account* MN Bank - 2 (Checking) \$1,375.09

Save
Save and Add Another
or Cancel

* = Required

08/27/2015	Sold	\$5,000.00
------------	------	------------

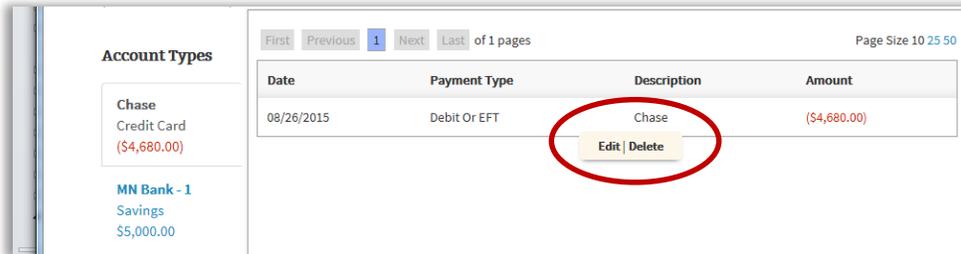
Account Types

- Chase Credit Card (\$4,680.00)
- MN Bank - 1 Savings \$10,000.00
- MN Bank - 2 Checking \$1,375.09
- Savings Account 2 Savings \$500.00

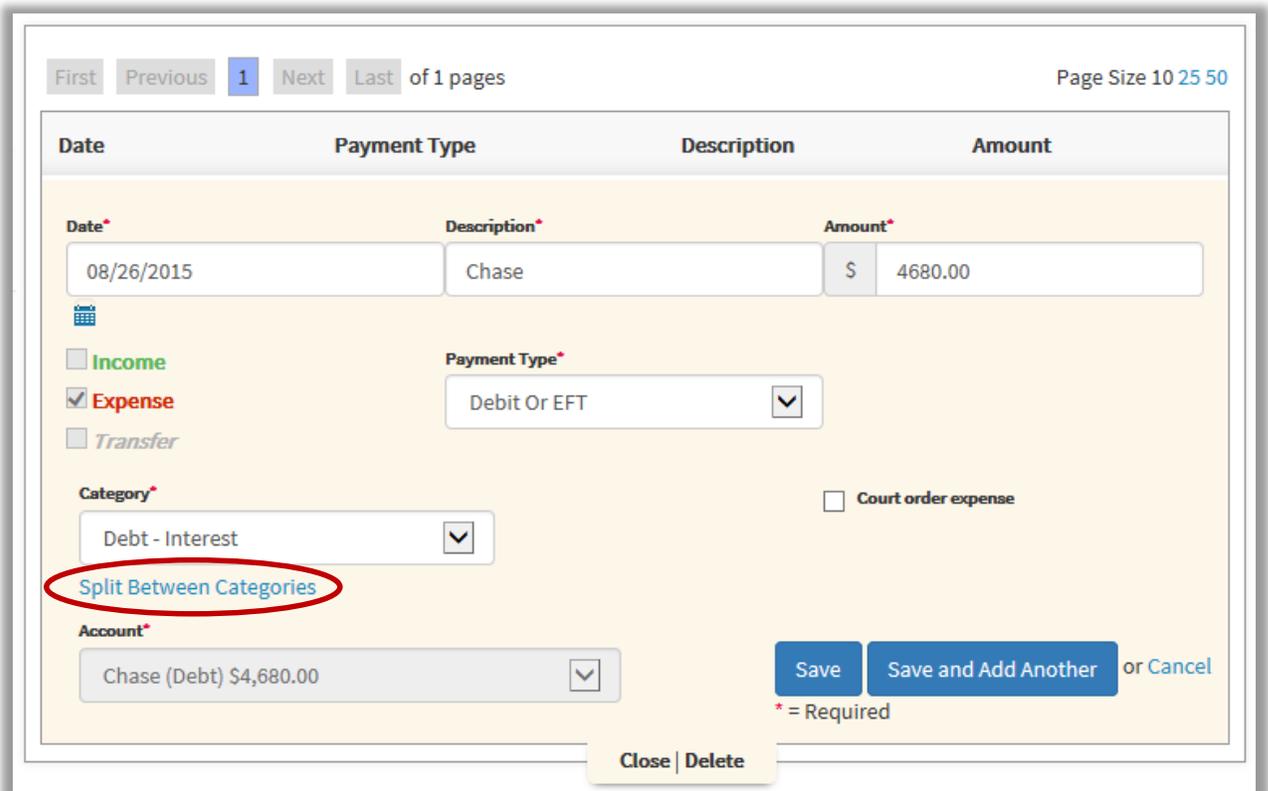
Entering Split Transactions

A split transaction reflects more than one category for one income or expense entry. After entering the transaction for the full amount using one of the applicable categories, perform the following the steps:

1. Hover over the transaction to be split until you see a popup menu to Edit|Delete. Click **Edit**.

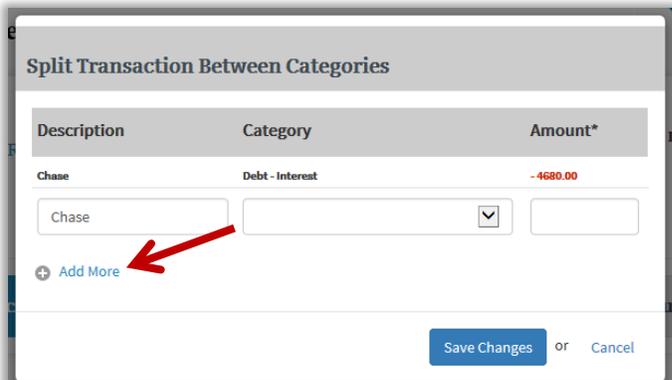


2. Click **Split Between Categories**.



3. Enter the new category and the amount to be split out from the original entry.
4. Click **Save Changes**.
 - a. For multiple splits, click **Add More**.

Note:
It is not necessary to split beyond 2-3 categories on a single transaction.



Adding a New Financial Account within the Annual Report

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).

Name	Type	Value
MN Bank - 1	Savings	\$5,000.00
MN Bank - 2	Checking	\$1,375.09
Trustone	Savings	\$9,842.00
Visa	Credit Card	(\$2,468.00)
Chase	Credit Card	(\$4,680.00)

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

First Previous **1** Next Last of 1 pages Page Size 10 25 50

Date*	Description*	Amount*
08/26/2015	Savings Account 2	\$ 500.00



Income
 Expense
 Transfer

Category*
Assets Omitted from Inventory/Account

An asset discovered after the inventory has been filed may be entered here.

Account*
Savings Account 2 (Savings) \$0.00

or

* = Required

12. Click **Save**.

Opening a New Financial Account with Funds from an Existing Asset

Identify your 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 a web interface with a navigation bar at the top containing five tabs: **Financial Accounts** (active), **Income & Expenses**, **Personal Property**, **Real Estate**, and **Review & Submit**. Below the navigation bar, there is a section for **Files** with the text "There are currently no files uploaded." and an **Upload a File** button. The main content area is titled **All Accounts** and features a red arrow pointing to a green **Add Account** button, with a blue **Export Accounts** button next to it. On the left side, there is a sidebar for **Account Types** with the following categories: **All Accounts (5)**, **Bank Account (3)** (i.e. Checking, Savings), **Investment (0)** (i.e. Stocks, Bonds), and **Debt (2)** (i.e. Loans, Credit Cards). The main table displays the following data:

Name	Type	Value
MN Bank - 1	Savings	\$5,000.00
MN Bank - 2	Checking	\$1,375.09
Trustone	Savings	\$9,842.00
Visa	Credit Card	(\$2,468.00)
Chase	Credit Card	(\$4,680.00)

3. Click **Save**.
4. Transfer the funds from the existing account to the new account following the instructions for transfers between accounts.

Closing an Account

You may need to report that an account has been closed or remove an account from your report. 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, follow the instructions for [transfers between accounts](#).

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

Name	Type	Value
MN Bank - 1	Savings	\$5,000.00
MN Bank - 2	Checking	\$1,375.09
Trustone	Savings	\$9,842.00

Account Name*	Account Type	Value*
Savings Account 2	Savings Account <input type="checkbox"/>	\$500.00 ?
Account Number*	Interest Rate	
999999999	2.00 %	

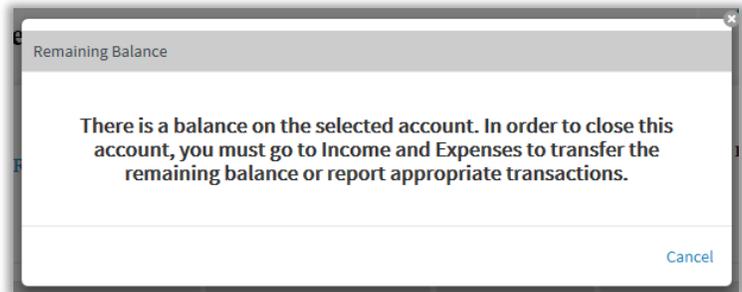
Close/Remove Account 

Save or **Cancel**

* = Required

Close

3. Click **Save**.
4. If the account is not at zero, a message will appear:
5. At the confirmation message, "Are you sure you want to close this account?" select **Yes** to close the account.
6. The account you closed should now say Closed in the value column.



Important:

On an account that has been opened and closed without transactions, this operation cannot be reversed.

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. If no funds were received, enter 0.00.
8. Click **Save**.
9. The value for this item will change to "DISPOSED" on the Personal Property tab.

Description	Type	Value
<p>Description* Value*</p> <p>2011 Honda Accord \$ 7000.00</p>		
<p>Type</p> <p>Car/Truck ▼</p> <p><input type="checkbox"/> Court order purchase</p>		
<p>Loan On Property?</p> <p><input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>Did you dispose of this personal property? <input checked="" type="radio"/> Yes <input type="radio"/> No</p>		
<p>Add an Income Transaction for the property sale:</p> <p>Date* Disposition Description*</p> <p>08/27/2015 Sold</p>		
<p>Proceeds Deposited into <input type="checkbox"/> Court order disposal</p> <p>MN Bank - 1 (Savings) ▼</p>		
<p>Sale Amount* Category</p> <p>\$ 5000.00 Personal Property Disposed ▼</p>		
<p>Save or Cancel</p> <p>* = Required</p>		
<p>Close</p>		<p>diamond ring \$2,000.00</p>

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 net 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 (indicated by a red arrow)
- 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.

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 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.

Note:
 If the bond record has been connected to co-conservators, the bond will show up multiple times, once for each co-conservator.

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. Complete the fee information
- b. 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:
\$500.00

What is your hourly fee?
 \$ 0

Do you have a variable Rate? Yes No

What is your Minimum Fee:
 \$ 20

What is your Maximum Fee:
 \$ 50

Did you receive additional compensation for your services?
 Yes No

Previous Next

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)

Previous Next

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.
- 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.

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](#)

Previous Next

8. Check the box indicating, "Criminal Background Accuracy".

- a. If Yes, provide details of the change.
- b. If No, click **Next**.

Criminal Background Accuracy

Has the information in the most recent criminal background study on file with the court changed? Yes No

Previous Next

9. Check the box indicating, "Final Report".

- a. If this is not the final report, continue to click **Next** and continue to step 10.
- b. If this is the final report, refer to the section, "[Identifying Your Report as the Final Account](#)".

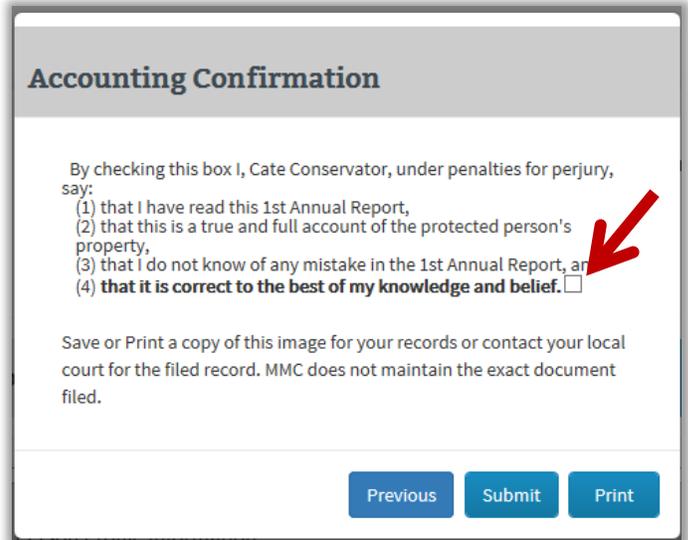
Final Report

Is this the Final Report? Yes No

Previous Next

10. 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.



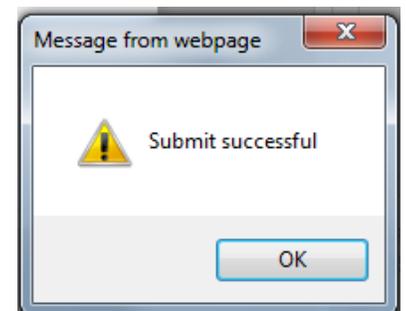
11. Here you may print a copy of the report, return to previous questions, go back and edit your account or submit the report.

12. If you return to the account, you will need to go through the submit process again.

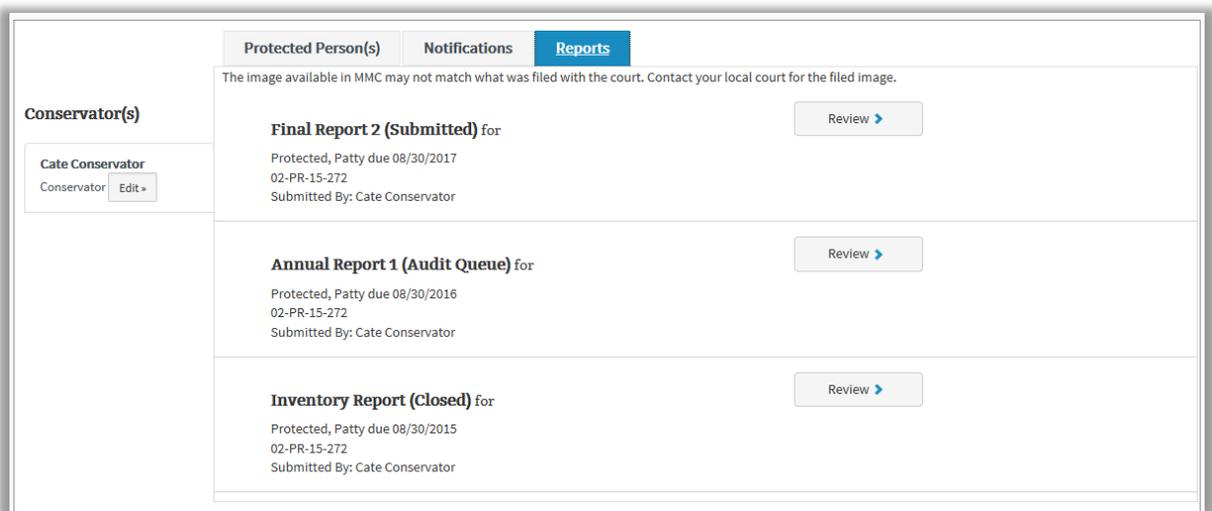
13. Click **Submit** to file your report with the court. This may take a few minutes.

14. You will receive a verification message indicating your submission was successful.

- a. If your report was successfully submitted, it will be sent to the court.



- i. You may confirm this by returning to the Reports tab on your dashboard. Beside "Annual Account", it will indicate "Submitted" if it is in the court queue awaiting review. It will show "Audit Queue" if it has gone to the audit queue. When either the court review or the audit is completed, it will then show as Closed.



If your report failed to send:

- ii. Check your internet connection. If your internet connection is ok, try to re-submit.
- iii. Log out and check the Welcome page for announcements indicating if MMC is currently unavailable. Return to the program after it becomes available again.

- iv. If the account still fails to send, contact the service desk via the link at the bottom of this website: www.mncourts.gov/conservators.
 - b. Once submitted you will be returned to the review page where you may again print the report if you wish.
15. You may now return to your dashboard or log off.

Identifying Your Report as a Final Account

A final account is filed when the appointment of the conservator has been terminated. Submitting your account as a final account will include language on your report requesting you be discharged as conservator. A question within the submit process will ask you if this is your final report. If you select yes, you will be asked to indicate why it is a final report and provide your last transaction date.

Final Report

Is this the Final Report? Yes No

Previous Next

Final Report

Is this the Final Report? Yes No

Note: Indicating **YES** for a final report means your appointment has ended and will include a request to be discharged as conservator.

Final Report Reason:

- Protected Person restored
- Successor conservator appointed
- Protected Person deceased
- Assets Depleted or Other

Set Transaction End Date:

1/29/2015

The date that you enter will be provided with this annual account. If the protected person is restored to capacity use Date of Restoration. If the protected person is deceased, use Date of Death, if the protected person has a successor conservator, the assets are depleted or there is another reason for the final account use the accounting ending date or Date of Discharge.

Previous Next

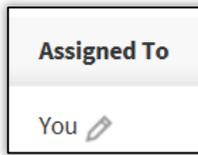
Appendix A: Designated Agents

Designating an Agent

An agent is typically an attorney or an accountant hired to assist you with preparing your reports to the court.

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 register the case with the case number and anniversary date.

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



2. From the dialog box, click the checkbox indicating **Enable Designated Agent**.



3. Click **Save Changes**.

On the Dashboard, under the 'Assigned to' column, you will now see "You & Designated Agent". Now your designated agent can register and connect to your case.

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**.

Appendix B: 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 mmc.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 mmc.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 mmc.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 mmc.courts.state.mn.us?"
- Your options are Open, Save, or Cancel. Click **Open**.
- A spreadsheet of your real estate information will open.

Appendix C: 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**.

The screenshot shows the MMC interface with a navigation bar at the top containing 'Financial Accounts', 'Income & Expenses', 'Personal Property' (highlighted in blue), 'Real Estate', and 'Review & Submit'. Below the navigation bar, a message states 'Files: There are currently no files uploaded.' A red arrow points to a blue 'Upload a File' button. To the right of this button is a yellow box with an information icon and the text 'Help is Off Turn On'. Below the navigation bar, there are two buttons: 'Add Property' (green) and 'Export Property' (blue). The main content area features a table with the following data:

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

On the right side of the table, there is a summary box showing 'Financial Assets: \$1,100.00' and '+ Personal Property: \$10,000.00'.

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

After you've submitted your report, you will be able to view your uploaded .pdf documents from the report review. You can also upload additional supporting information requested by the court by using the "Upload a File" button:

The screenshot shows a box titled 'File Uploads'. Below the title, there is a section labeled 'Files:' containing a link to 'Example Attachment.pdf'. Below the link is a blue button labeled 'Upload a File'.

Appendix D: Professional Conservators

MMC has features unique to professional conservators that allow them to manage their caseloads by identifying employees and assigning cases to those employees. The first person to set up an account for the professional conservator will automatically be recognized as an administrator.

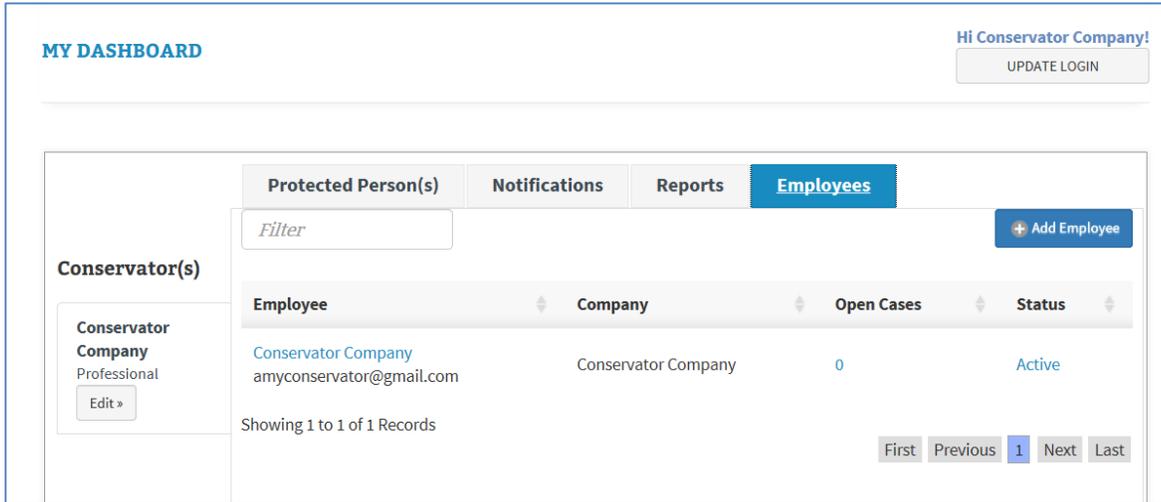
If MMC recognizes multiple party records from court records (MNCIS) for your name/company, you will see the name multiple times along the left side of the screen. The top tab on the left will identify "All." From the All tab, you can access all cases; however, you cannot assign cases from that tab. You can only assign from the individual conservator tab(s).

As appointments are made for the professional conservator on new cases, the case may automatically appear on the dashboard. If not, click "Add Case" and register the case with the file number and date the Letters of Conservatorship were issued.

The screenshot displays the 'MY DASHBOARD' interface. At the top right, it says 'Hi Conservator Company!' with an 'UPDATE LOGIN' button. A 'Dashboard Tutorial' link is visible. The main content area has tabs for 'Protected Person(s)', 'Notifications', 'Reports', and 'Employees'. Under 'Protected Person(s)', there is a section for 'Unassigned Protected Person' with a warning icon and the text: 'Click the Assign button to assign an employee to this protected person.' Below this, a table entry shows 'Protected, Peter' with 'Inventory Report (New)' and an 'Assign' button. A red arrow points to a blue '+ Add Case' button on the right. On the left, a callout box with a red border contains the text: 'Additional Party tabs, if any, will appear here.' Below the main content, there is a table header with columns: 'Protected Person(s)', 'Current Report', 'Case Number', 'Anniv Date', and 'Assigned To'. The table currently shows 'No data available in table' and 'Showing 0 to 0 of 0 records'. Navigation buttons for 'First', 'Previous', 'Next', and 'Last' are at the bottom right of the table area.

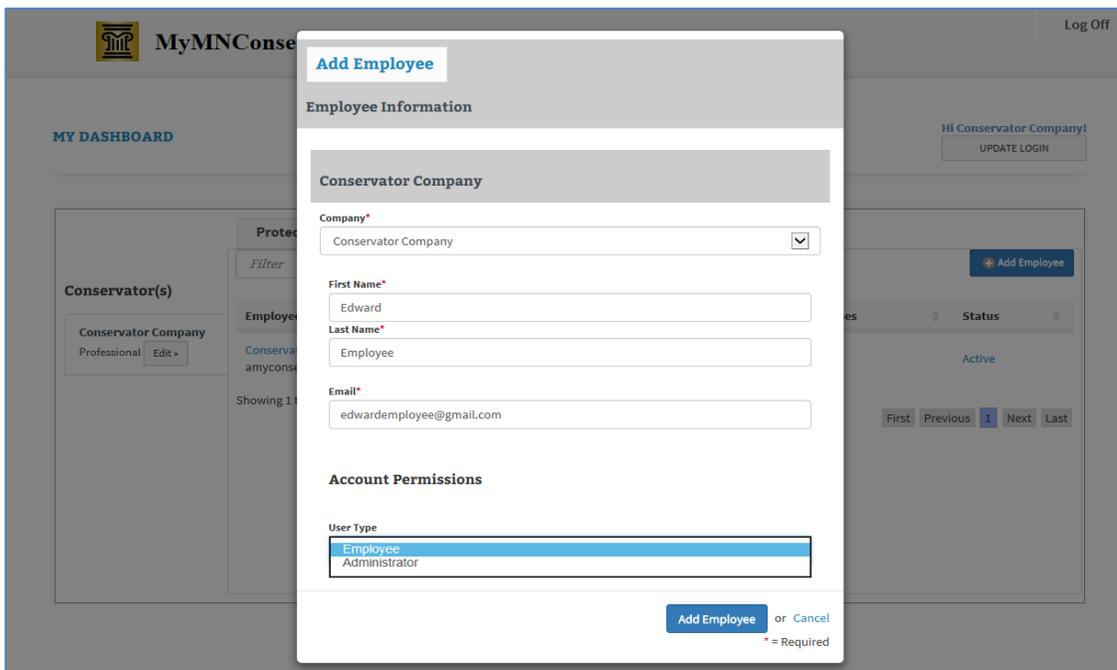
Adding Employees or Additional Administrator(s)

To see the employees list, click on the “Employees” tab. To add employees, click “Add Employee.”

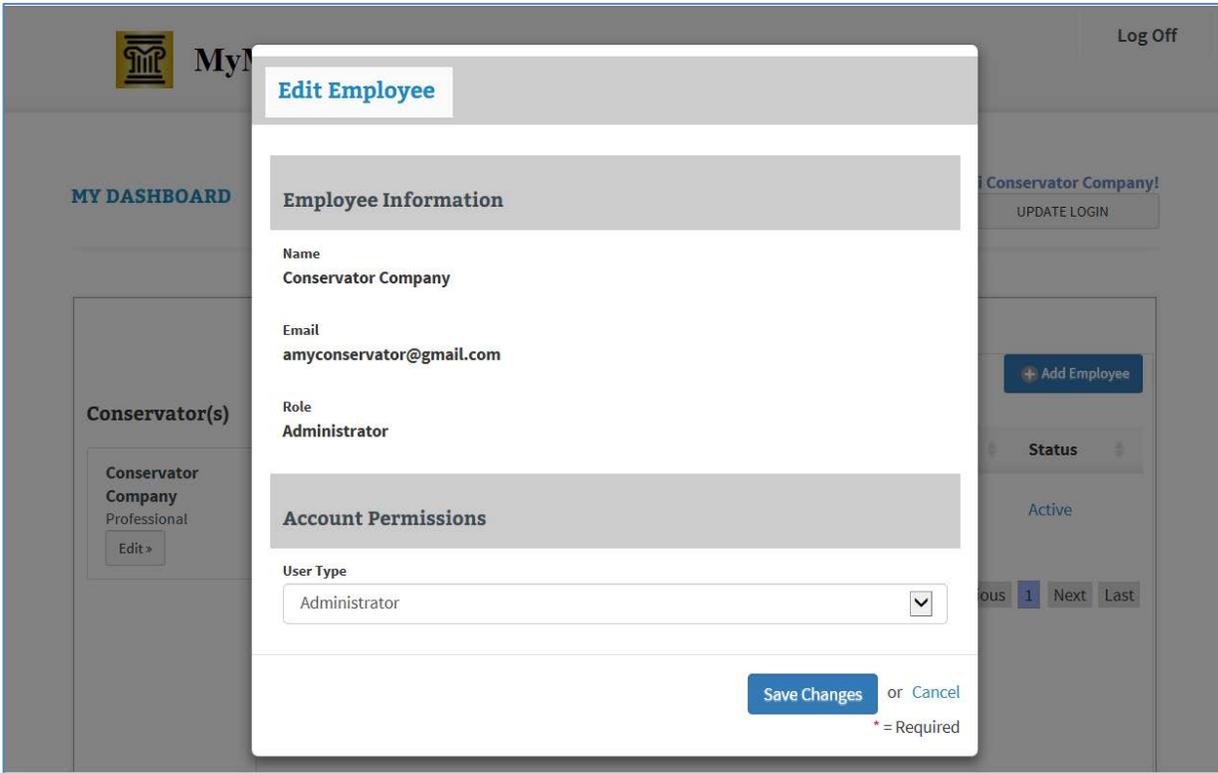


An administrator will be able to add and assign cases and add and deactivate employees.

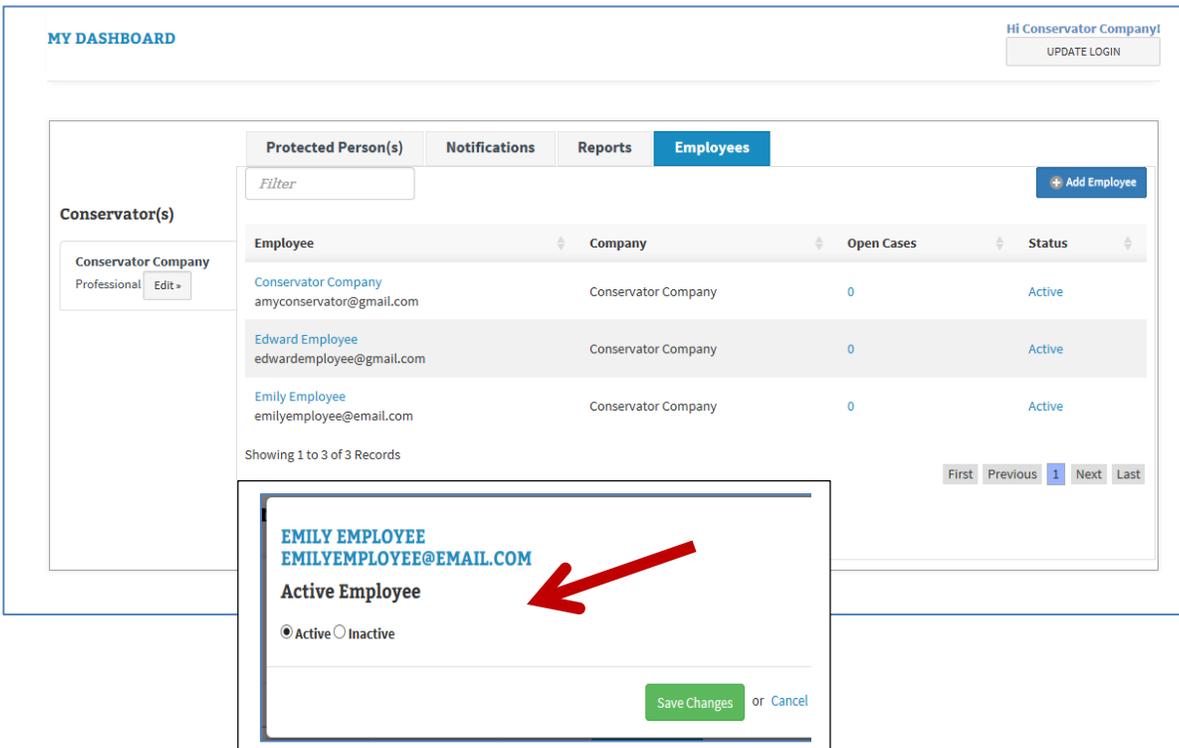
Identify the employee as an administrator (with rights to assign cases and add/deactivate employees) or as an employee (with access to work only on the cases that are assigned). You may have more than one administrator. In fact, it is a good idea to assign a second administrator in the event that one leaves the agency/company. The employee then needs to create their own MyCourtMN account and must use the same email address when setting up their account as was used by the administrator to add them as an employee.



To change an employee's role, click on the employee's name on the employee tab and then on "Edit Employee."



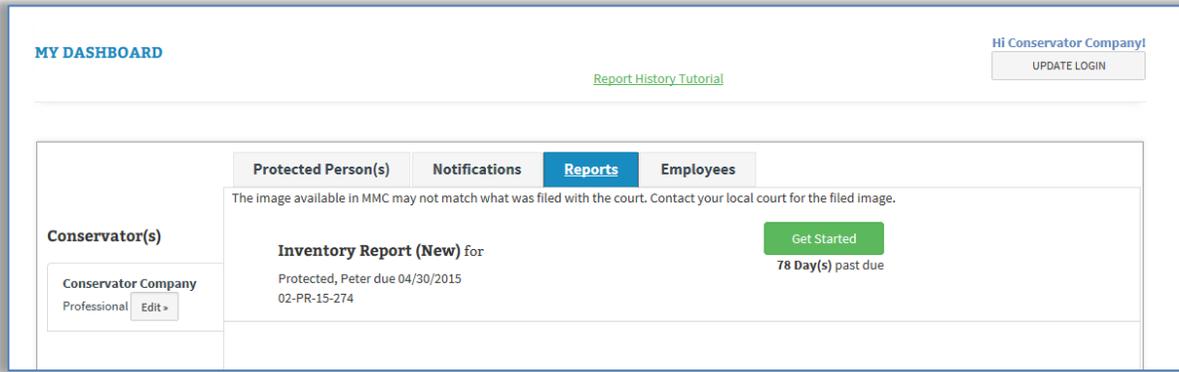
To make an employee inactive, change the status from active to inactive on the employee tab. You cannot make an employee inactive while cases are assigned.



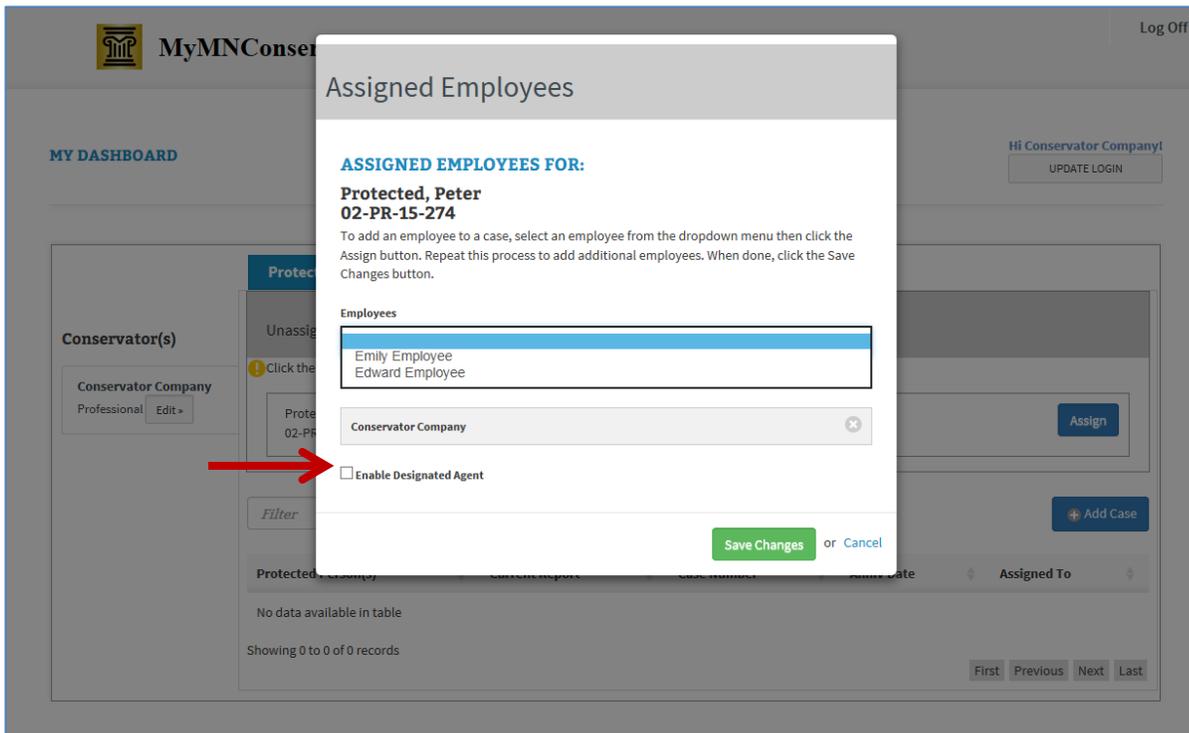
Assigning Cases

Unassigned cases appear at the top of the dashboard. Once assigned (recommended), they move to the bottom of the dashboard where you are able to sort and search for cases.

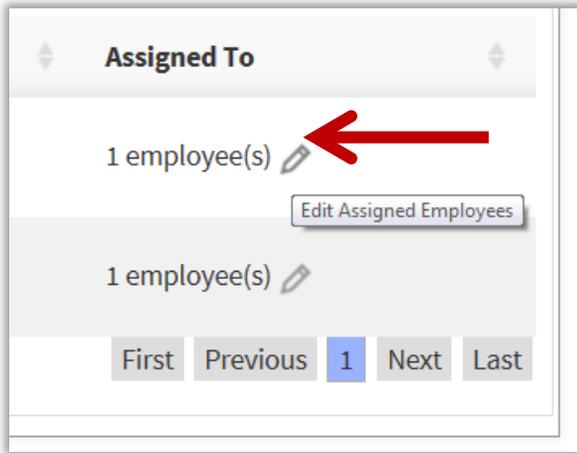
If a case has not yet been assigned, you can still work on the reports from the “Reports” tab.



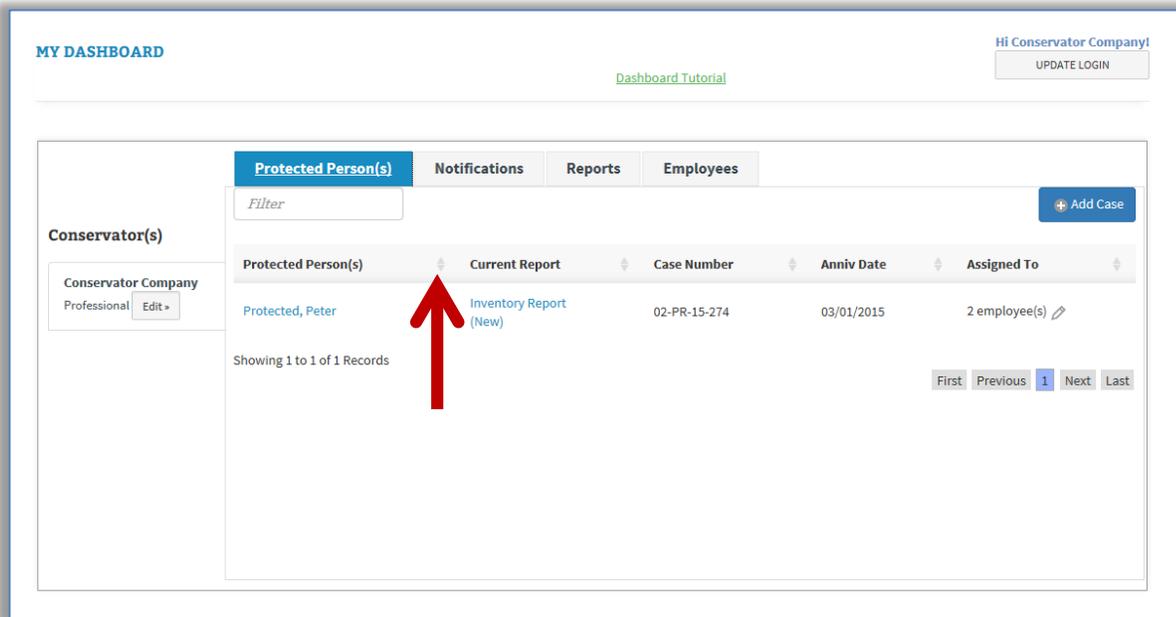
To assign employee(s), click on the assign button (from the conservator tab, not from the “All” tab). You can assign multiple employees. Also from the assign tab, you may enable the designated agent feature (see [Designated Agent](#) section).



To change the employee assigned, unassign an employee or assign additional employee(s) click on the pencil icon in the "Assigned To" column on the dashboard and make changes.



Cases that are assigned can be sorted on the dashboard by any of the column headers (Protected Person(s), Current Report, etc.) by clicking on the double arrows to the right of the header. You can also use the filter box to look for names, numbers, dates, etc.



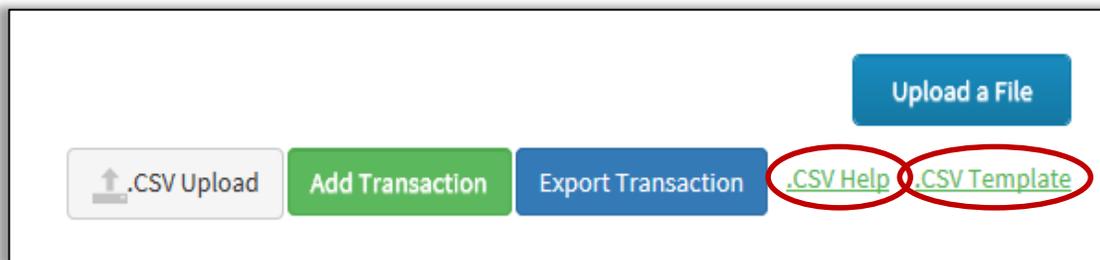
Appendix E: Entering Transactions via .CSV Upload

Conservators, who are already using popular accounting software to maintain their financial accounts, may find it convenient to bring that data into MMC via .csv upload. The template from within MMC must be utilized for a successful upload. Always use a new template from your current report to ensure you have the most recent version of the template. Older versions will not upload properly.

Note:

You are not required to use the .csv upload function. Transactions may be manually added under the [Income & Expense](#) tab in MMC.

1. From the Income and Expense tab, click the .CSV Template hyperlink.



2. Convert the data from your accounting program into the spreadsheet.
 - Do not change formatting in the spreadsheet.
 - Do not include transfers in the spreadsheet; add those manually.
 - Refer to the .CSV Help document for additional details about formatting the spreadsheet and for troubleshooting tips.
3. Label and save the spreadsheet on your computer.
4. Click **.CSV Upload** and browse to find your file. 

Uploading multiple income and expense transactions with the .csv template file

1. Download the .csv template from the help section.
2. Open the file and enter the income and expense data for all required columns.
 - a. In the Transaction Date field, enter the date the transaction cleared. Do not change the date format. For example, use 4/25/2014.
 - b. In the Description field, enter a brief description of the transaction, not to exceed 25 characters.
 - c. In the Amount field, enter the amount of the transaction. This amount must always be entered as a positive number. Do not add extra characters (e.g., commas, dollar signs, etc.).
 - d. In the Is Expense radio buttons, indicate No or Yes, if this is an expense.
 - e. In the IsIncome radio buttons, indicate No or Yes, if this is an income transaction.
 - f. In the Category field, enter the category description, if known.

- g. Enter the three-digit number from the list of Transaction Categories. Do not include extra characters.
- h. In the Account field, include a brief description of the account.
- i. In the Account Number field, enter the financial account number that is associated with the transaction. This number must EXACTLY match the number of a financial account that you have already entered into MMC. If you are unsure of the exact numbers of the account, you may click "Export Accounts" while on the Financial Accounts tab in the annual report to view a complete list of account numbers.
- j. Select the Payment Type.
- k. In the Transaction Payment Type ID field, if your *expense* transactions include various payment types, it is recommended that you enter the following"
 - For *checks*, enter the number **1**
 - For *EFT/Debit*, enter the number **2**
 - For *Cash*, enter the number **4**
 - For *Depreciation*, enter the number **5**
- l. Column L: CheckNumber
 - If the expense was paid by check, include the check number in this column. Do not add additional characters.
- m. Column M: MortgagedRealEstate
 - This field is not required. Real Estate must be manually entered under the Real Estate tab in MyMNConservator.
- n. Column N: MortgagedRealEstateReportId
 - This field is not required. Real Estate must be manually entered under the Real Estate tab in MyMNConservator.
- o. Column O: SoldProperty
 - This field is not required. Personal Property must be manually entered under the Personal Property tab in MyMNConservator.
- p. Column P: SoldPropertyId
 - This field is not required. Personal Property must be manually entered under the Personal Property tab in MyMNConservator.
- q. Column Q: Amended
 - This field is not required. Leave blank.
- r. Column R: TrustName
 - This field is not required. Leave blank.
- s. Save the changes to the file. The file must be saved as a .csv file and the .csv extension in the file name.
- t. Upload the file to MyMNConservator using the .csv upload button.

CSV File Tips & Troubleshooting

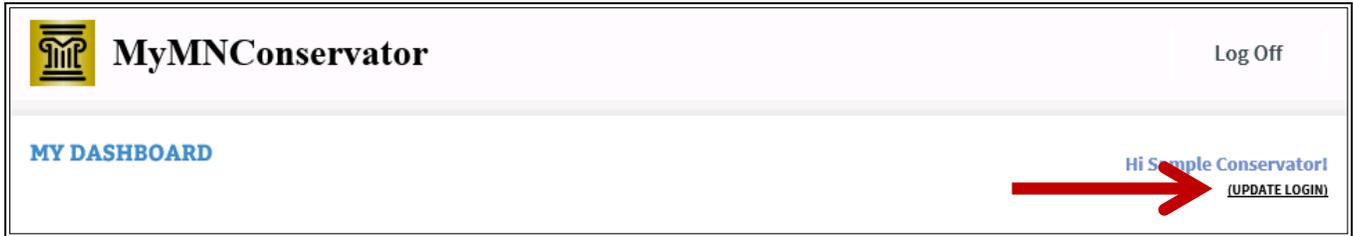
If you are unable to successfully upload your .csv file, please review the following to help resolve the issue.

- Use the latest .csv template. The link is available in your annual report in MyMNConservator.
- Do not change the format of the spreadsheet. For example, do not change the number format or add or delete any columns.
- Do not use negative dollar amounts or dollar signs.
- Do not exceed the max number of characters allowed in the file name.
- Verify that account numbers exactly match the account numbers previously added to MyMNConservator.
- If after attempting to upload a .csv file, you receive the message "Successfully imported xxx transactions", DO NOT upload the same file again or you will have duplicate transactions. To view your uploaded transactions, click on the appropriate financial account under the Income & Expense tab.
- For an example of a completed .csv file, please see [CSV Example for MMC](#).

Appendix F: User Settings

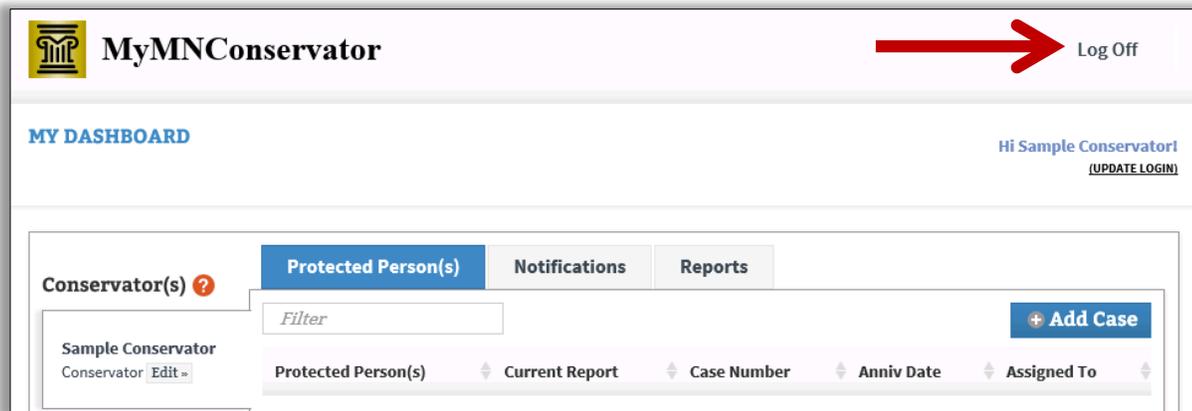
Updating Your MyCourtMN Information

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.



Logging Out

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



Appendix G: Joint Accounts

Joint Accounts

A joint account is a financial account that is held by more than one person, each individual having the right to deposit and withdraw funds. The conservator must establish a separate financial account to deposit and disburse the protected person's funds, and should not co-mingle assets at any time. Open separate financial account(s) naming the conservator(s) and the protected person but giving the conservator(s) control of the account.

Inventory

To properly reflect the protected person's share of the bondable asset in the Inventory, the conservator should report half of the value of the joint assets. Identify a joint account by including the notation "joint" in the description field.

Note:

Tangible personal property and real estate assets should also be entered with half the value on the inventory. Identify a joint asset by including the notation "joint" in the description field.

Annual Accounts

While the existing joint account(s) is in use, all transactions must be reported in MyMNConservator. At the beginning of the Annual Account period, an income adjustment categorized as "Joint Account Holder Income" must be entered to increase the beginning balance to the full value of the financial account(s). Use the description "Restore joint account value" for this transaction.

All transactions for each account need to be reported in MyMNConservator. If transactions in a joint account belong solely to the non-protected person, they should be labeled "Joint Account Holder Income" or "Joint Account Holder Expense." Payments for joint expenses (for example: mortgage payments) should be entered using the specific category.

Before submitting your Annual Account, you must adjust to properly reflect the protected person's share of the bondable assets at the end of the Annual Account period. An expense adjustment categorized as "Joint Account Holder Expense" must be entered to reduce the ending balance by half. Use the description "Remove joint account value."

An additional income adjusting entry, as explained above, will then be required at the beginning of the next Annual Account period to increase the balance back to the account's full value. These dual adjustments will need to be completed every year that the joint account(s) remain(s) in existence. It is highly recommended that a separate account be established for all of the protected person's assets and that you DO NOT continue to use joint accounts. Do not terminate the protected person's interest in joint assets without seeking a court order (M.S 524.5-411(a)(8)).