



**MINNESOTA
JUDICIAL BRANCH**

MyMN Conservator (MMC) User Manual for Conservators

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(MJB_SP_1063h)

Table of Contents

- Table of Contents2**
- About MyMN Conservator (MMC)3**
 - Website Resources.....4
 - For Assistance.....4
 - Terms.....5
 - Conservator Account Auditing Program (CAAP) and Conservator Account Review Program (CARP)6
 - Document Resources6
 - About this Document6
- Getting Started7**
 - Creating a MyCourtMN Account and Accessing MMC7
 - First Time Case Registration.....7
- My Dashboard8**
 - Navigation8
 - Viewing Report History8
 - Online Help8
 - Setting up the Conservator Profile.....10
 - Setting up the Person Subject to Conservatorship Profile12
 - Adding Additional Cases13
 - Notifications14
- Reports.....14**
 - Overview14
 - Inventory Report.....15
 - For Newly Appointed Conservators15
 - Adding a Financial Account15
 - Adding Receivables.....17
 - Adding Personal Property.....18
 - Adding Real Estate.....20
 - Review and Submit Tab.....22
 - Editing Information22
 - Previewing and Printing the Inventory Report.....22
 - Using Print Preview in MMC.....22
 - Submitting the Inventory to the Court23
- Annual Account Report.....27**
 - Starting the Annual Report27
 - Recording Income and Expenses28
 - Viewing Your Transactions.....29
 - Entering Transactions for Debt Accounts30
 - Making Payments to Debt Accounts32
 - Transfers between Accounts.....33
 - Entering Split Transactions34
 - Adding a New Financial Account within the Annual Report.....35
 - Opening a New Financial Account with Funds from an Existing Asset.....37
 - Closing an Account38
 - Updating Information Regarding Receivables.....39
 - Disposing of Personal Property.....39

Recording the Sale of Real Estate..... 41

Submitting the Annual Account to the Court 42

Identifying Your Report as a Final Account 46

Appendix A: Designated Agents47

Designating an Agent..... 47

Un-designating an Agent..... 47

Appendix B: Exporting Account Information to a Spreadsheet48

Exporting Financial Accounts to a Spreadsheet 48

Exporting Income and Expense Information to a Spreadsheet from an Annual Account..... 48

Exporting Receivables Information to a Spreadsheet..... 48

Exporting Personal Property Information to a Spreadsheet..... 48

Exporting Real Estate Information to a Spreadsheet..... 48

Appendix C: Uploading a File.....49

Appendix D: Professional Conservators50

Adding Employees or Additional Administrator(s)..... 51

Assigning Cases 53

Appendix E: Entering Transactions via .CSV Upload.....55

Uploading multiple income and expense transactions with the .csv template file..... 55

CSV File Tips & Troubleshooting..... 57

Appendix F: User Settings58

Updating Your MyCourtMN Information 58

Logging Out..... 58

Appendix G: Joint Accounts.....59

Joint Accounts..... 59

Inventory 59

Annual Accounts..... 59

Appendix H: Receivable Type Descriptions60

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, Conservator Account Auditing Program (CAAP) audit reports and Conservator Account Review Program (CARP) review reports filed directly from MMC to the MN Case Information System (MNCIS).
- Address updates made in either system, MMC or MNCIS, 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.

Website 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. 763-347-4437) 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: 763-347-4437) for assistance with MMC.

Terms

Account Review Report - Documentation of the review of a filed account completed by an account reviewer.

Annual Account (also Periodic Account) - A report to the court detailing the handling of assets by a court-appointed conservator on behalf of a person subject to conservatorship 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.

CARP – Conservator Account Review Program - The office that reviews accounts in a non-audit year.

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

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 and ordered by the court.

Designated agent - An attorney or accountant or other responsible person 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 person subject to guardianship.

Guardianship - A legal arrangement giving an appointed person the authority to make personal decisions on behalf of the person subject to guardianship 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 person subject to conservatorship controlled by the conservator identified at the time the conservator was appointed.

Letters of Conservatorship - A legal document signed by the judge that documents authority as conservator of the person subject to conservatorship.

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

MMG - MyMNGuardian: An online program for guardians 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.

Person Subject to Conservatorship - The person for whom a conservator has been appointed.

Person Subject to Guardianship - The person for whom a guardian has been appointed.

Receivables - Assets held outside of the conservatorship available for the benefit of, or monies owed to, the person subject to conservatorship.

Conservator Account Auditing Program (CAAP) and Conservator Account Review Program (CARP)

Annual accounts filed with the court are subject to audit or review. 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 person subject to conservatorship'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. Upload your supporting documents to your report in the MMC program if possible. 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

A review is a limited review of the account by a reviewer with the Minnesota Conservator Account Review Program (CARP) and will require submission of the financial statements as above but not usually the additional detailed documents unless specifically requested.

Document Resources

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

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

For information about the timing of audits and reviews: [Audit and Review Frequency](#).

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

Creating a MyCourtMN Account and Accessing MMC

Refer to [ORG – Creating a MyCourtMN User Account Using Multi-Factor Authentication](#).

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

The screenshot shows a web form titled "Case Registration". It includes an "Instructions" field with a question mark icon, a "Protected Person's Case Number*" field with a text input box labeled "Case Number", and a "Protect Person's Anniversary Date*" field with a date input box labeled "MM/DD/YY" and a calendar icon. A green "Register" button is at the bottom, with a note "* indicates a required field." A red callout box points to the question mark icon, containing the text: "Hover over the question mark icon for instructions on how to enter a case number."

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."



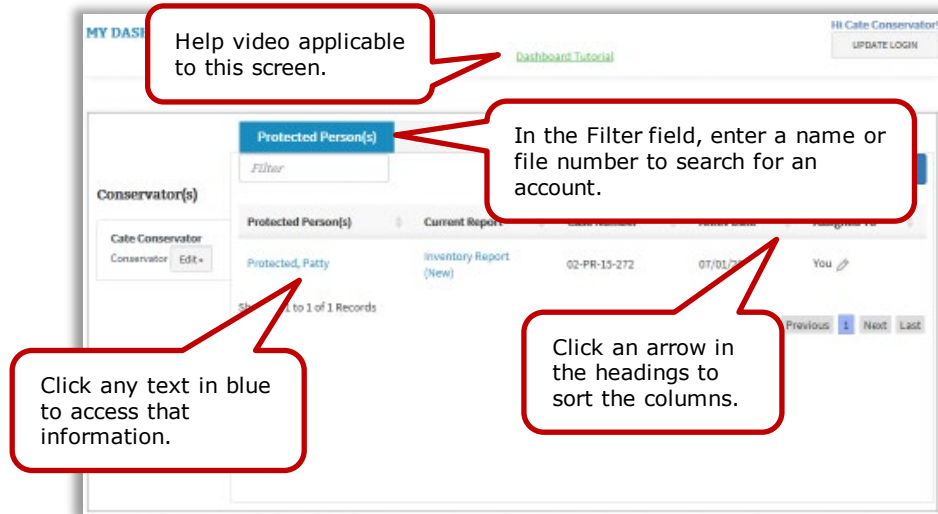
Samples of errors

- 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 (763) 347-4437.

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.



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 Person subject to conservatorship'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 review is not complete.
- Audit Queue** The account is in the audit queue.
- Review in Progress** The account is currently assigned to a reviewer.
- 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 CARP queue awaiting review. The status "Audit Queue" appears right away if the Inventory, 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."

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.

 Help is Off
[Turn On](#)

 Help is On
[Turn Off](#)

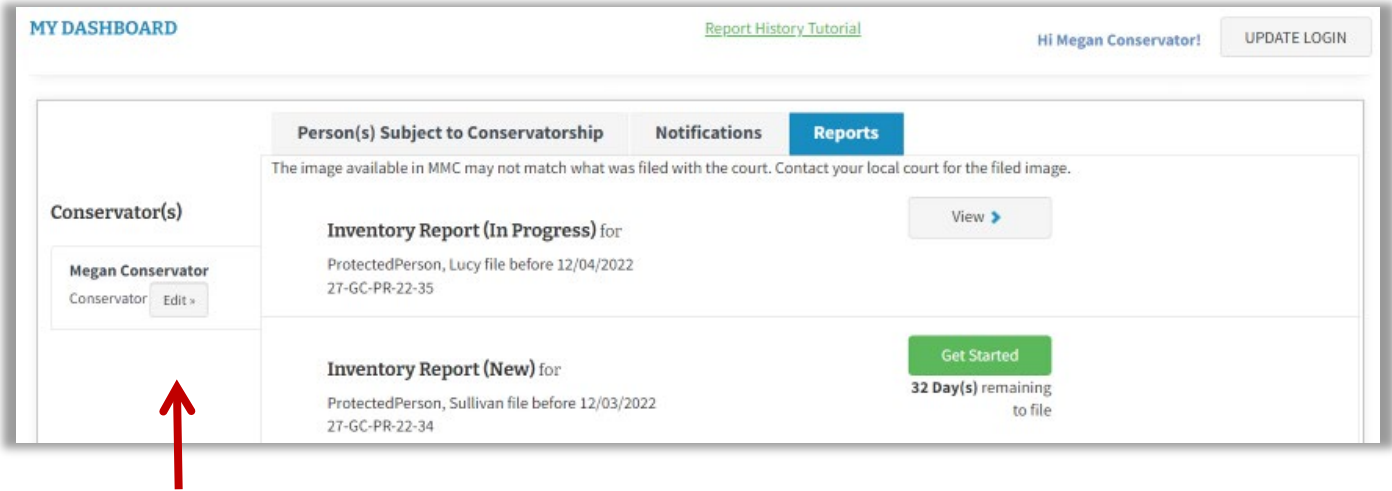
Does Patty Protected have any bank accounts, investments, or debt? Enter the value of each account as of 07/01/2015. This date corresponds with your letters of conservatorship and is the start date of your accounting period.

Yes: *No:*

- 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 cases to which you are assigned appears on the Person(s) Subject to Conservatorship 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 person subject to conservatorship if it doesn't already appear or is incomplete. 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) once the update is accepted.

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"/>	<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

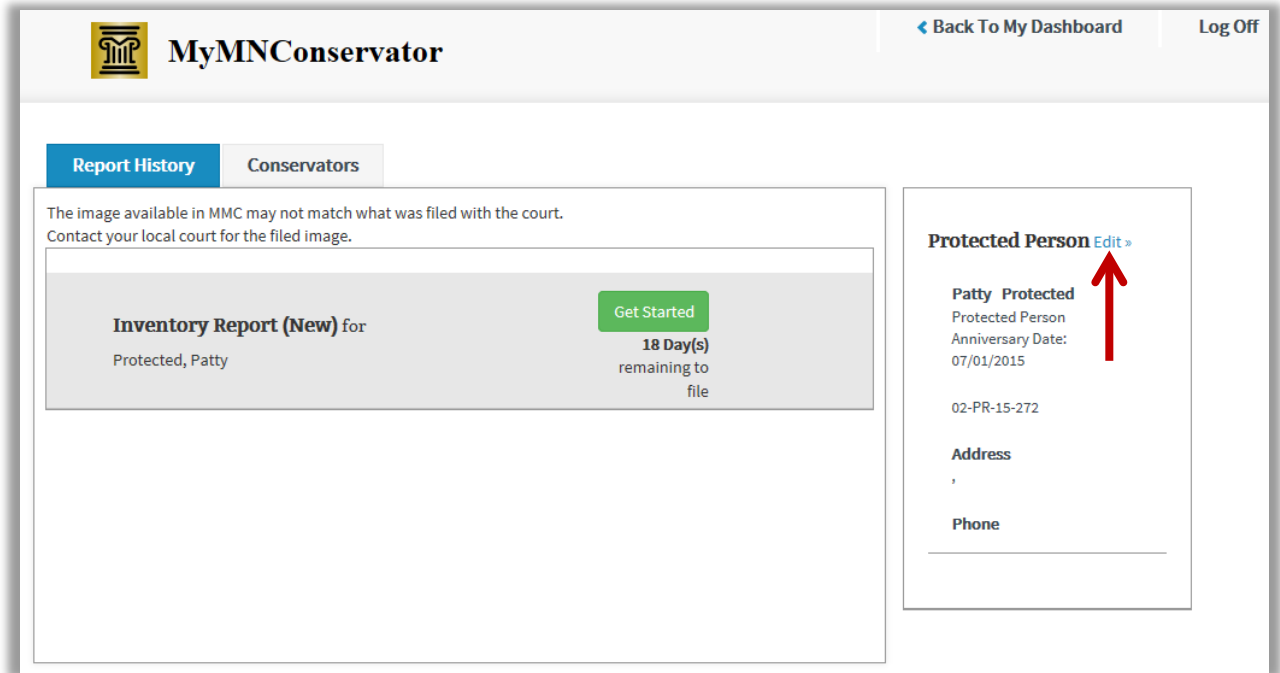
Email Notifications

Receive Alert Emails Push Notifications

or
* = Required

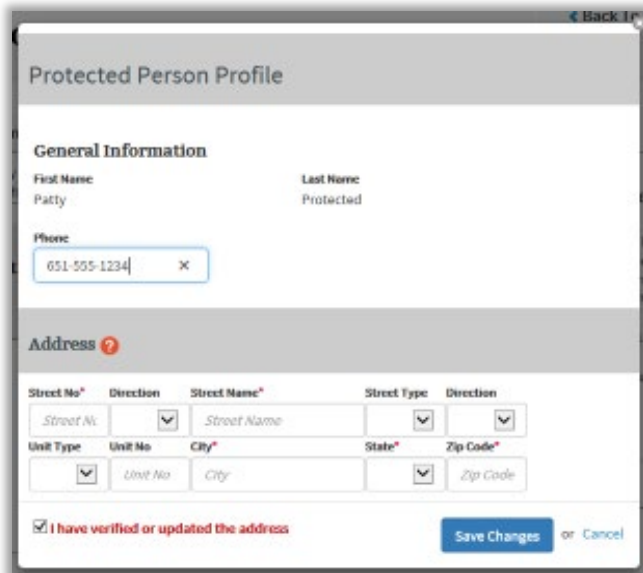
Setting up the Person Subject to Conservatorship Profile

1. From the Dashboard, click the Person subject to conservatorship’s name hyperlink.
2. From the Report History page, click **Edit** by the person’s name.



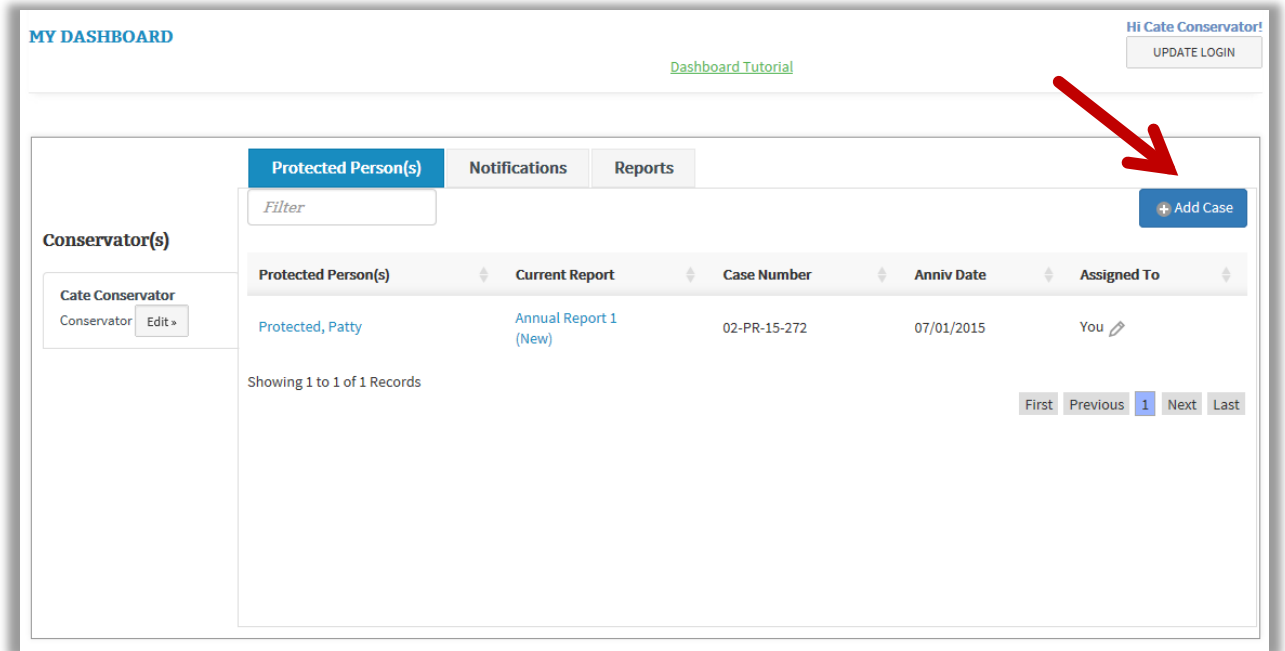
3. Enter the phone number and address information.
 - a. Enter the information where the Person subject to conservatorship actually lives, not your information.
 - b. Once you check that you have verified or updated the address, the Save Changes button becomes available.
4. Click **Save Changes**.

The Person’s address will be saved in MMC, as well as MNCIS once accepted.

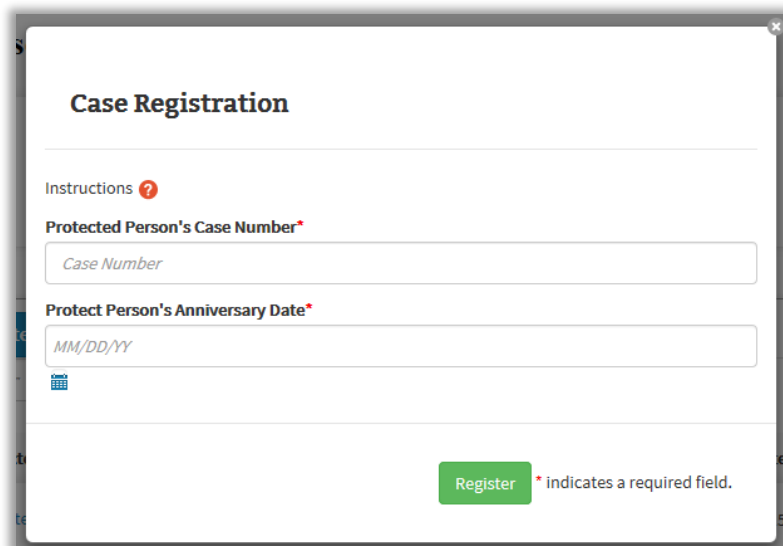


Adding Additional Cases

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 Person subject to conservatorship(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:

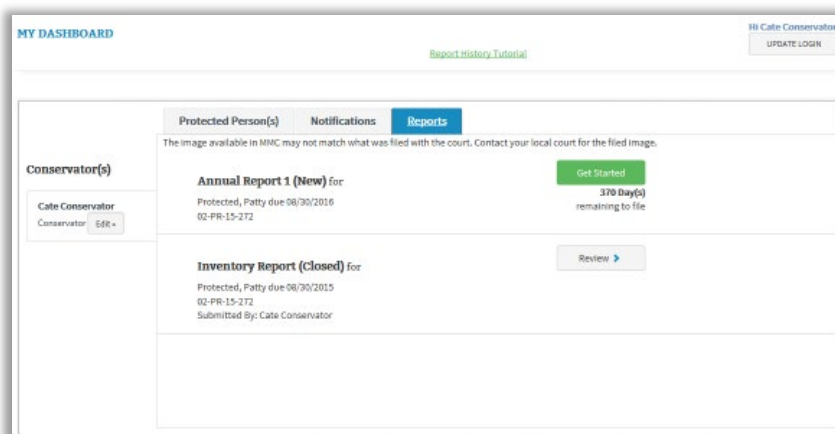
You may click the "x" in the message box to delete the message(s) after you read them.

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, Person subject to conservatorship(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 person subject to conservatorship that you control as conservator. Accounts outside the conservatorship, such as trusts, should not be included here. 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**.

2. Enter the account name. This should identify the name of the bank or company, not the name of the person subject to conservatorship. 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. **Do not** use account numbers.
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.

The screenshot shows the 'All Accounts' section of a software interface. On the left, there is a sidebar with 'Account Types' and their counts: 'All Accounts (2)', 'Bank Account (2) (i.e. Checking, Savings)', 'Investment (0) (i.e. Stocks, Bonds)', and 'Debt (0) (i.e. Loans, Credit Cards)'. A callout box points to these counts with the text 'The numbers change as you enter accounts.' The main area contains a table with columns 'Type' and 'Value'. It lists 'MN Bank - 1' with 'Savings' type and '\$5,000.00' value, and 'MN Bank - 2' with 'Checking' type and '\$1,500.00' value. On the right, a summary panel shows 'Financial As: \$6,500.00', 'Personal Property: \$0.00', and 'Bondable Assets: \$6,500.00'. A callout box points to these totals with the text 'The totals change as you enter values.'

Adding Receivables

Receivables are any assets held outside of the conservatorship available for the benefit of, or monies owed to, the person subject to conservatorship. Examples of reportable receivables include monies owed due to a loan, note or contract for deed; monies owed due to a court order or judgment; funds held in various types of trusts and monies managed by a fiduciary who is not the conservator.

The screenshot displays the 'SARAH PROTECTEDPERSON INVENTORY REPORT' for the period of 10/25/2022. The 'Receivables' tab is selected in the navigation menu. A questionnaire asks: 'Is Sarah ProtectedPerson due funds from other sources due to court orders, contracts or loans/promissory notes? Does Sarah ProtectedPerson have a separate account for personal spending? Is Sarah ProtectedPerson a beneficiary of a trust?' and 'Does Sarah ProtectedPerson receive Social Security, Veterans Administration funds or railroad pension and the conservator is NOT the representative payee/fiduciary?'. Below the questions are 'Yes' and 'No' sections with buttons for 'Quick Reference Guide' and 'Proceed To Personal Property'. At the bottom, there is an 'Upload a File' button and a 'Receivable' section with 'Add Receivable' and 'Export Receivables' buttons.

1. To enter receivables, click **Add Receivable**.

2. Enter the description of the receivable following the instructions provided for each type.
3. Enter the value of the receivable. If the value is not known, check **Unknown**.
4. Select receivable type from the drop-down.

Note:
 If selecting Trust – Other, choose Revocable/Irrevocable Status. See Receivable Type Descriptions list in Appendix H for assistance with choosing a type.

5. Click **Save**.

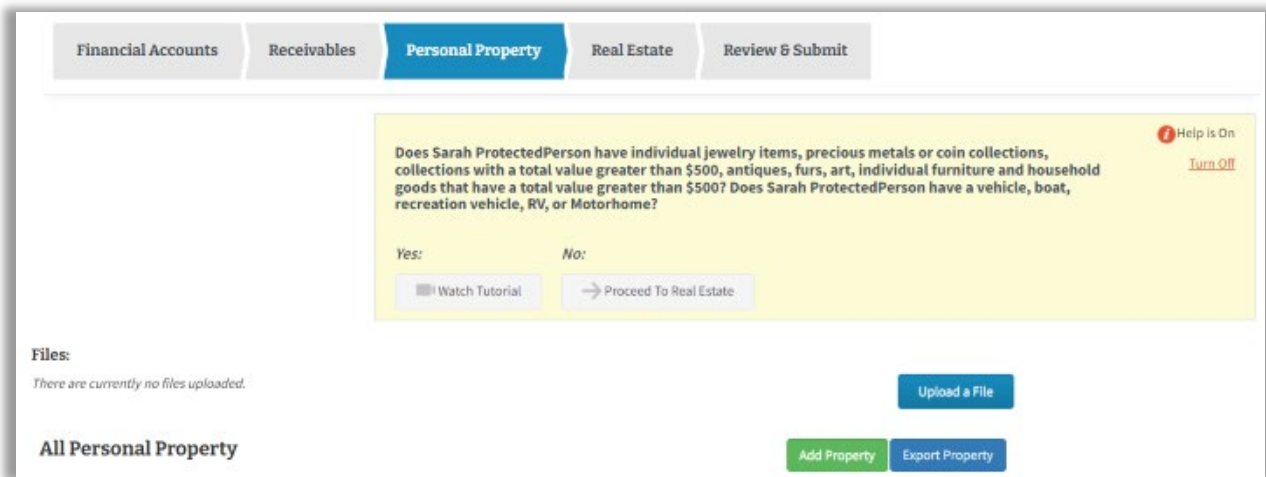
Adding Personal Property

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.

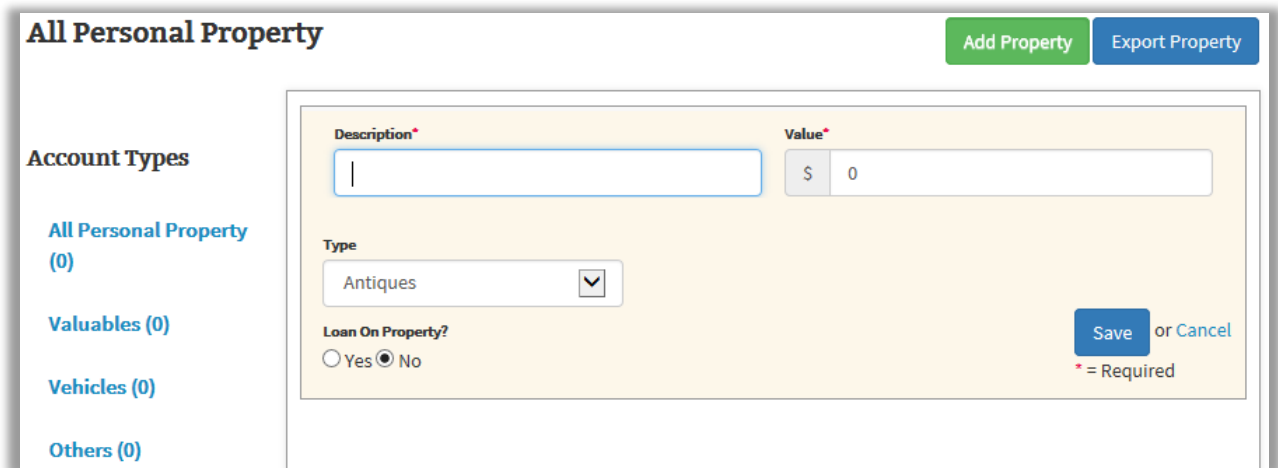
Does the person subject to conservatorship have individual jewelry, precious metals, valuable collections, antiques, furs, art, or individual furniture items that are worth \$500 or more? Items such as vehicles, boats, and recreational vehicles are also reported here. You should also report general household 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.



If the 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 Kelley Blue Book.

6. To enter the property, click **Add Property**.



7. Enter the description of the property.
8. Enter the value of the property.
9. Select property type from the drop-down.
10. 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](#).)

Loan On Property?
 Yes No

If the loan associated with this item is not listed, save this property and return to the [Financial Accounts](#) tab to add the loan, then return to the property tab and edit this property to add the loan.

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

- 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.

11. Click **Save**.

Adding Real Estate

Does the person subject to conservatorship 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.

The screenshot shows the 'SARAH PROTECTEDPERSON INVENTORY REPORT' interface. At the top, it displays 'Period: 10/25/2022' and '60 Days To File Last Updated No Updates'. Below this, the 'CASE NUMBER: 71-PR-22-2' is shown, along with a link for 'Previous CAMPER Data'. A navigation bar contains tabs for 'Financial Accounts', 'Receivables', 'Personal Property', 'Real Estate' (which is highlighted in blue and pointed to by a red arrow), and 'Review & Submit'. Below the navigation bar is a yellow informational box with the text: 'Does Sarah ProtectedPerson own a home, rental property, land, or business? Enter a brief description to identify the property. Enter the estimated market value from the most recent tax statement in the "Tax Value" field. You are not required to change the tax value from year to year. It will simply be used to determine if there is a loss or gain on the property at the time of sale. Use the mortgage value for the property as of the date of your letters. Remember that you must petition the court for permission to sell real estate.' Below this text are two columns: 'Yes:' with a 'Watch Tutorial' button and 'No:' with a 'Proceed To Review' button. At the bottom left, there is a 'Files:' section stating 'There are currently no files uploaded.' At the bottom right, there are three buttons: 'Upload a File', 'Add Real Estate' (highlighted with a red arrow), and 'Export Real Estate'.

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

The screenshot shows a form for adding real estate. It contains several sections:

- Description***: A text input field.
- Real Estate Type**: A dropdown menu currently showing "Homestead".
- Tax Value***: A field with a "\$" icon and the value "0".
- Is there a mortgage on the property?**: Radio buttons for "Yes" (selected) and "No".
- Tax Year**: A dropdown menu showing "2015".
- Current Mortgage Amount**: A field with a "\$" icon and the value "0".
- Mortgage Interest Rate**: A field with the value "0" and a "%" icon.
- Mortgage Payment**: A field with a "\$" icon and the value "0".
- Is there rental income?**: Radio buttons for "Yes" (selected) and "No".
- Monthly rental income***: A field with a "\$" icon.
- Are there any liens or encumbrances on the property?**: Radio buttons for "Yes" (selected) and "No".
- Description***: A text input field.
- Total Amount***: A field with a "\$" icon.

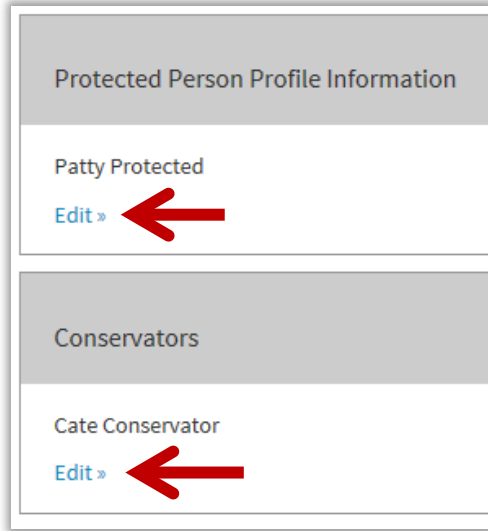
At the bottom right, there is a blue "Save" button, a "or Cancel" link, and a legend: "* = Required".

2. In the Description field, enter the address or brief location description (not the legal description).
3. Select the real estate type from the drop-down.
4. Enter the value from the latest tax statement.
5. Enter the year of the tax statement.
6. Indicate if there is a mortgage on the property.
 - a. If there is a mortgage on the property click **Yes**.
 - b. Enter the current mortgage balance from the statement closest to your anniversary date.
 - c. Enter the interest rate from the mortgage statement.
 - d. Enter the monthly payment from the mortgage statement.
7. Indicate if there is rental income on the property.
 - e. If there is rental income, click **Yes**.
 - f. Enter the monthly income that is usually received.
8. Indicate if there are liens on this property.
 - g. If there are liens on this property click **Yes**.
 - h. In the Description field, enter the lien holder name(s) and the amount of the lien(s).
 - i. If there is more than one lien, combine the values.
9. 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.



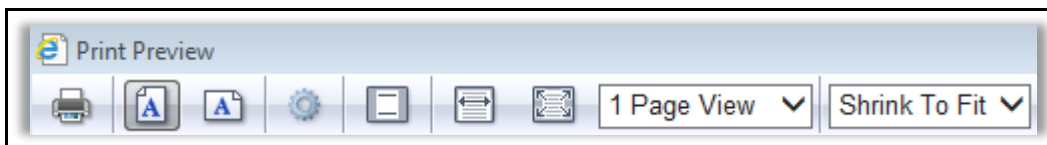
Previewing and Printing the Inventory Report

Click **Print** to preview your inventory report and/or print a copy of the inventory report to provide to the person subject to conservatorship and the interested parties. Note that a report printed prior to answering the questions during the submit process will not reflect the responses to those questions.

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 or the report does not print properly, 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.

The screenshot shows the 'Review & Submit' tab of an inventory report. At the top, it displays 'LUCY PROTECTEDPERSON', 'Period: 10/5/2022', and '33 Days To File Last Updated No Updates'. Below this is the title 'INVENTORY REPORT' and the case number 'CASE NUMBER: 27-GC-PR-22-35'. There are links for 'Previous CAMPER Data', 'Inventory Review and Submit Tutorial', and 'Tutorial'. A navigation bar contains five tabs: 'Financial Accounts', 'Receivables', 'Personal Property', 'Real Estate', and 'Review & Submit' (which is highlighted in blue). On the left, a 'Report Information' sidebar shows 'Inventory Report (In Progress)', 'Due Date: 12/4/2022', 'County: Hennepin', and 'Judicial District: 4th District'. The main content area is titled 'Profile Information for Person Subject to Conservatorship' and lists: 'Lucy ProtectedPerson', '345 Minnesota Way North', 'St Paul, MN 55511', '(651) 234-5678', and 'Edit'. On the right, there is an 'Export To CSV' button, a red arrow pointing to a 'Submit' button, a 'Print' button, and a summary of assets: 'Financial Assets: \$0.00' and '+ Personal Property: \$0.00'.

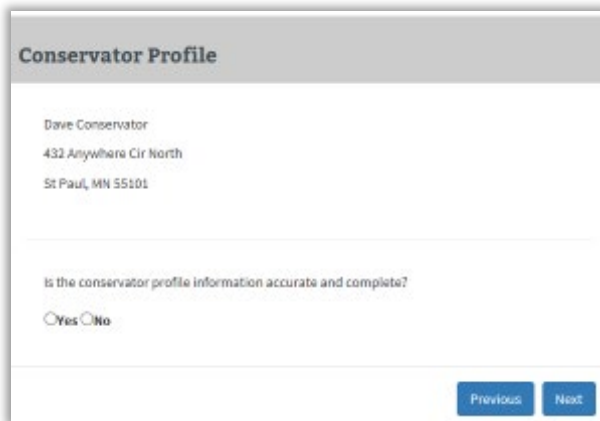
To submit your report to the court, click **Submit** and respond to the subsequent series of questions. If you click out of the submit process, you will start again at the first question when you return.

- 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.



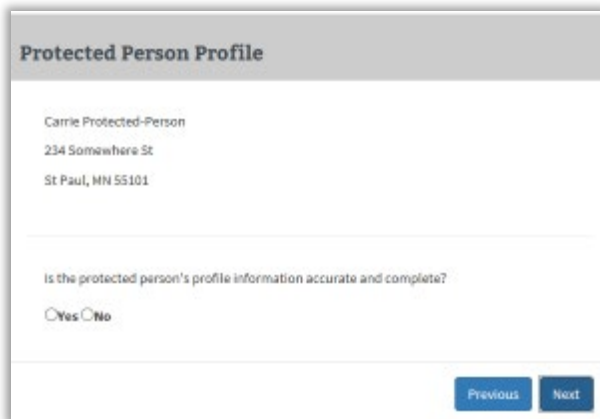
The screenshot shows a web form titled "Professional". Below the title is the question "Are you a professional conservator?" with radio button options for "Yes" and "No". A blue "Next" button is located at the bottom right of the form.

- 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.



The screenshot shows a web form titled "Conservator Profile". It displays the following information: "Dave Conservator", "432 Anywhere Cir North", and "St Paul, MN 55101". Below this is the question "Is the conservator profile information accurate and complete?" with radio button options for "Yes" and "No". At the bottom right, there are two blue buttons: "Previous" and "Next".

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



The screenshot shows a web form titled "Protected Person Profile". It displays the following information: "Carrie Protected-Person", "234 Somewhere St", and "St Paul, MN 55101". Below this is the question "Is the protected person's profile information accurate and complete?" with radio button options for "Yes" and "No". At the bottom right, there are two blue buttons: "Previous" and "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"/>

Add

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

Please provide correct bond information:

Previous **Next**

- 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 person subject to conservatorship and any interested persons.
 - b. In the text field, enter the names of all interested persons that were served. Separate the names with a comma.

Affidavit of Service

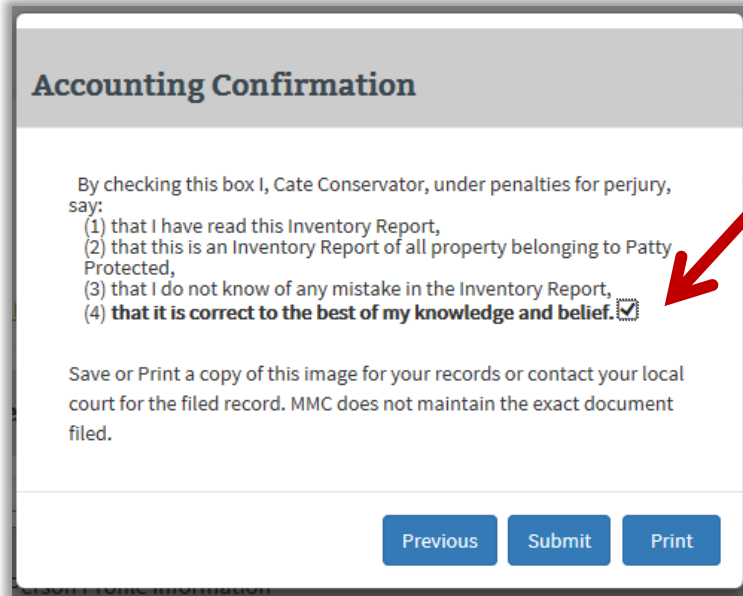
A copy of the report has been given to E THOMPSON and the following interested parties:

(Separate names with a comma)

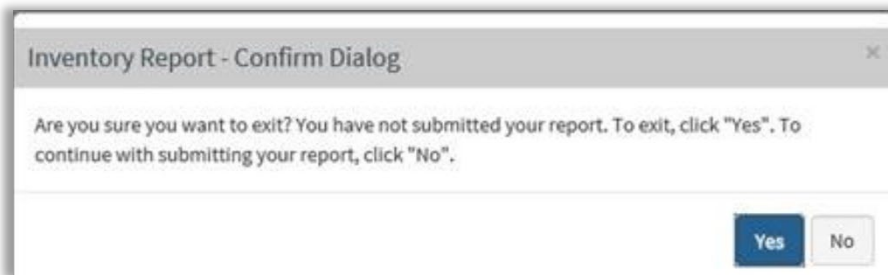
**You are required to serve a copy of this report on the protected person and interested parties. If you don't know who the interested parties are in your case, refer to the initial petition for appointment and M.S. 524.S-102 - see Subd. 7 or consult your attorney. If protected person cannot be served because they are deceased indicate in the comment box: "Protected Person deceased".*

Previous **Next**

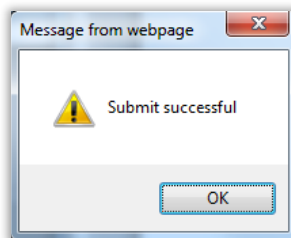
- 6. Confirm the accuracy of the report.
 - a. By checking this box you will confirm, under penalty of perjury:
 - i. that you have read the Inventory Report,
 - ii. that it is an Inventory Report of all property belonging to the protected person,
 - iii. that you do not know of any mistake in the Inventory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



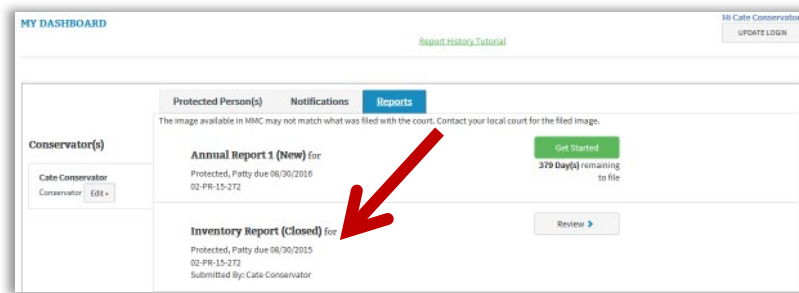
- 7. From here you may print a copy of the report, return to the previous questions, go back and make changes to the inventory, or proceed to submit the report. If you opt to print the report, you must still return to this question to submit the report.
- 8. If you leave and return to the inventory, you will need to go through the submit process again.
- 9. If you select to leave you will receive the below warning.



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



11. 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.
12. You may now return to your dashboard to start the next report or log off.

Annual Account Report

Starting the Annual Report

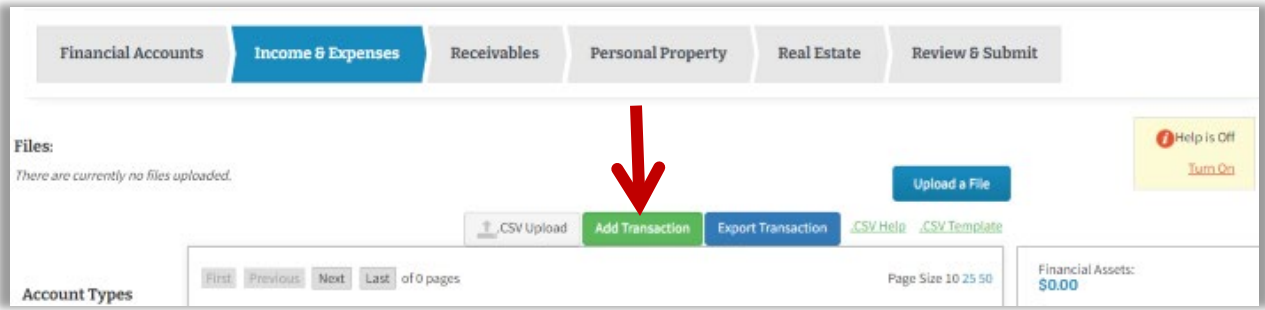
To start your account, from the Dashboard under Current Report, click **Annual Report**. This opens your report. An overview of the totals will appear on the right hand side. This information changes as new information is added to your report.

- **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 on the left that 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.

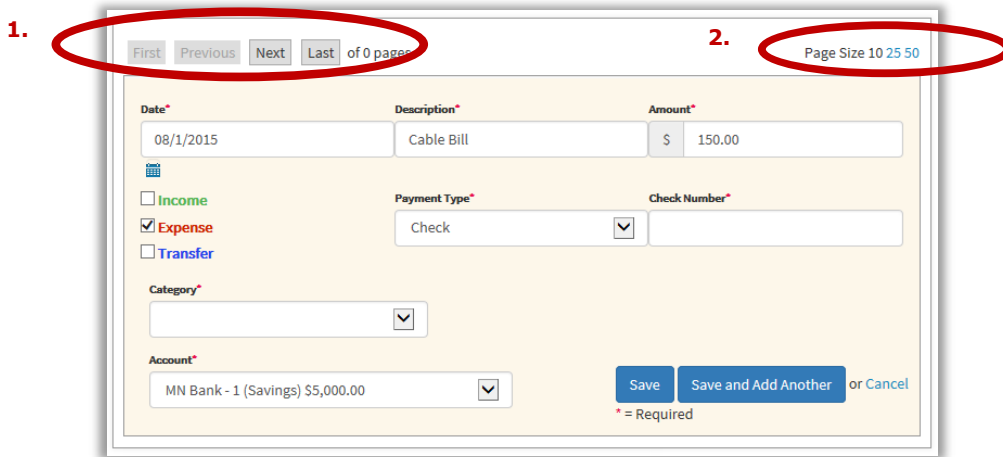


Note:
When you first enter MMC, the transaction date defaults to the current date; once you've entered a transaction, the date defaults to the last date entered.

3. Enter the date of the transaction from the financial statement.
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.



To check your transactions, here are some other options:

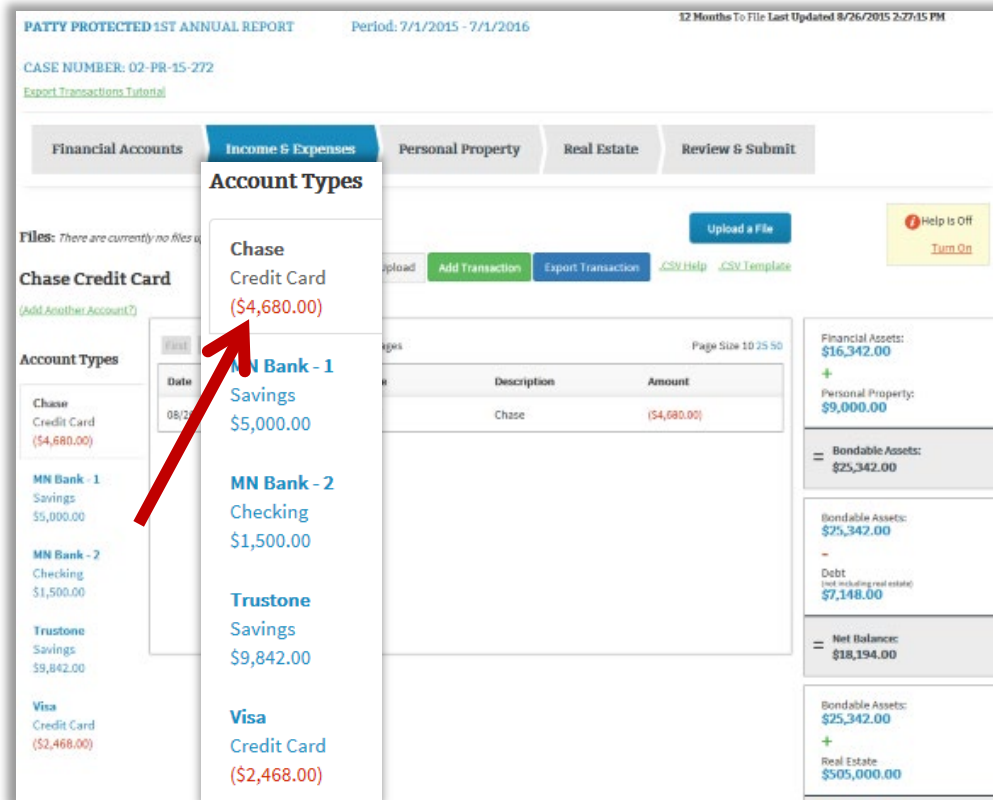
- On the Income & Expense tab, Export transactions. This creates a spreadsheet with your transactions.
- On the Review & Submit tab, click Print for a print preview of all transactions by category.
- On the Review & Submit tab, scroll down the page until you see Income & Expense Overview.
 - Click the 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.



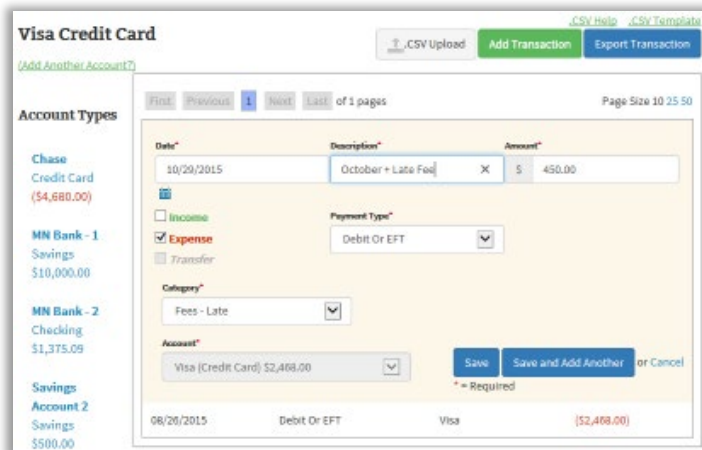
Date	Description	Account	Type	Number	Amount	Transaction
08/27/2015	Sold	MN Bank - 1	Savings		\$5,000.00	Personal Property Disposed
08/26/2015	Visa	Visa	Credit Card		(\$2,468.00)	Debt - Interest
08/26/2015	Savings	Trustone	Savings		\$9,842.00	Investment - Other
08/26/2015	Chase	Chase	Credit Card		(\$4,680.00)	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

Entering Transactions for Debt Accounts

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



- 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**.



- 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**.

The screenshot shows the 'Add Transaction' form for a Visa Credit Card. The form is titled 'Add Another Account?' and includes links for '.CSV Upload', 'Add Transaction', and 'Export Transaction'. On the left, there is a sidebar for 'Account Types' listing Chase Credit Card (\$4,680.00), MN Bank - 1 Savings (\$10,000.00), MN Bank - 2 Checking (\$1,375.09), Savings Account 2 (\$500.00), and Visa Credit Card (\$2,468.00). The main form area has a table with columns for Date, Description, and Amount. The current entry is for 10/29/2015, 'October + Interest', for \$450.00. Below the table, there are checkboxes for 'Income', 'Expense' (checked), and 'Transfer'. The 'Payment Type' is set to 'Debit Or EFT' and the 'Category' is 'Debt - Interest'. The 'Account' is 'Visa (Credit Card) \$2,468.00'. At the bottom, there are 'Save', 'Save and Add Another', and 'Cancel' buttons. A summary row at the bottom shows '08/26/2015', 'Debit Or EFT', 'Visa', and '\$(2,468.00)'. A note at the bottom right says '* = Required'.

- 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**.

The screenshot shows the 'Add Transaction' form for a Visa Credit Card. The form is titled 'Add Another Account?' and includes links for '.CSV Upload', 'Add Transaction', 'Export Transaction', '.CSV Help', and '.CSV Template'. On the left, there is a sidebar for 'Account Types' listing 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), and Visa Credit Card (\$2,468.00). The main form area has a table with columns for Date, Description, and Amount. The current entry is for 08/26/2015, 'Macy's Return', for \$29.99. Below the table, there are checkboxes for 'Income' (checked), 'Expense', and 'Transfer'. The 'Category' is 'Refund'. Below the category, there is a note: 'Use for tax, insurance, or other type of refund.' The 'Account' is 'Visa (Credit Card) \$2,468.00'. At the bottom, there are 'Save', 'Save and Add Another', and 'Cancel' buttons. A summary row at the bottom shows '08/26/2015', 'Debit Or EFT', 'Visa', and '\$(2,468.00)'. A note at the bottom right says '* = Required'.

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** or you can enter an alternate description.
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 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** or you can enter an alternate description.
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](#)

[Add Another Account?](#) [.CSV Upload](#) [Add Transaction](#) [Export Transaction](#)

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

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

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](#)

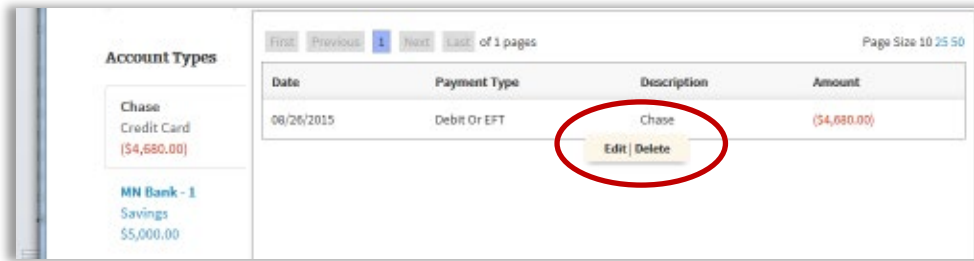
* = Required

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

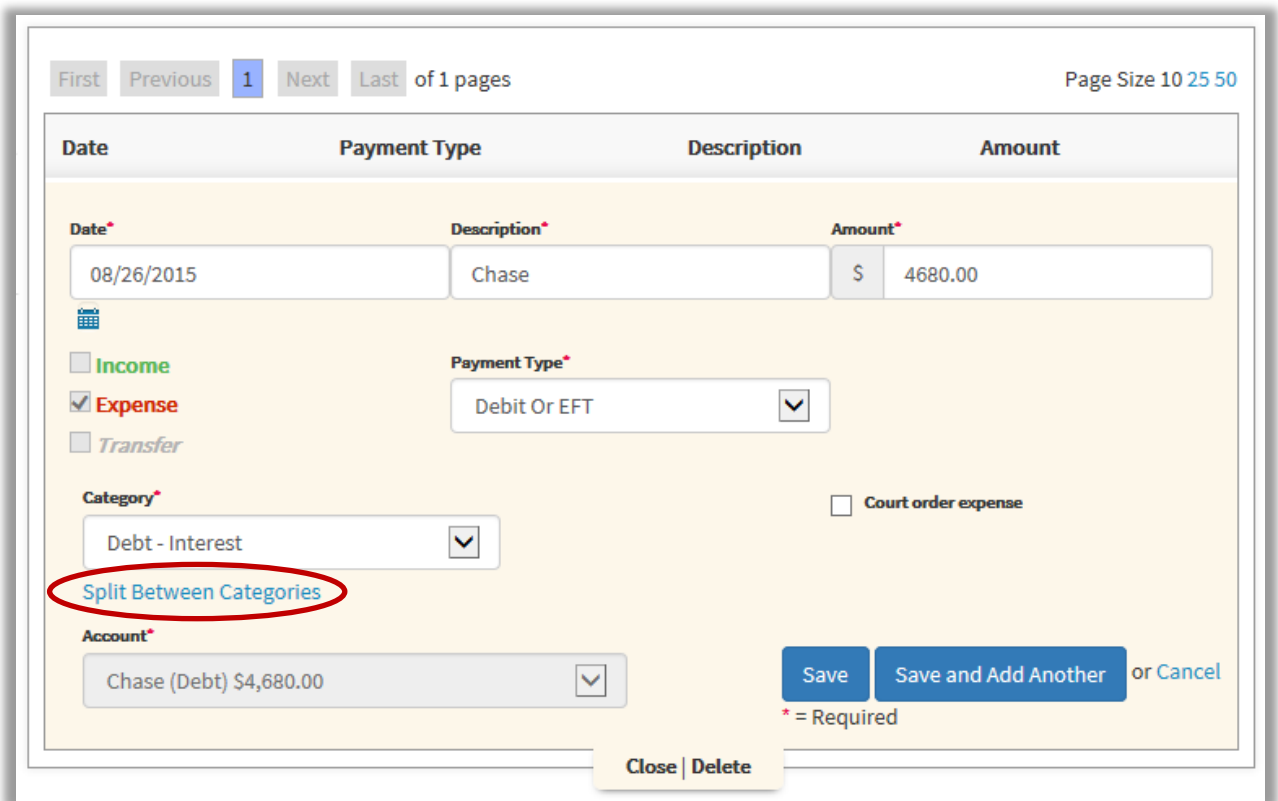
Entering Split Transactions

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).

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

Save Save and Add Another or Cancel

* = 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 the CAMPER system interface for a user named 'LUCY PROTECTEDPERSON' with a period of '10/5/2022'. The interface includes a navigation bar with tabs for 'Financial Accounts', 'Receivables', 'Personal Property', 'Real Estate', and 'Review & Submit'. Below the navigation bar, there is a section for 'Files' with a message 'There are currently no files uploaded.' and an 'Upload a File' button. At the bottom, there is a section for 'All Accounts' with a message 'All accounts for Lucy ProtectedPerson. Add current balances of accounts as of 10/05/2022.' and two buttons: 'Add Account' (highlighted with a red arrow) and 'Export Accounts'.

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 

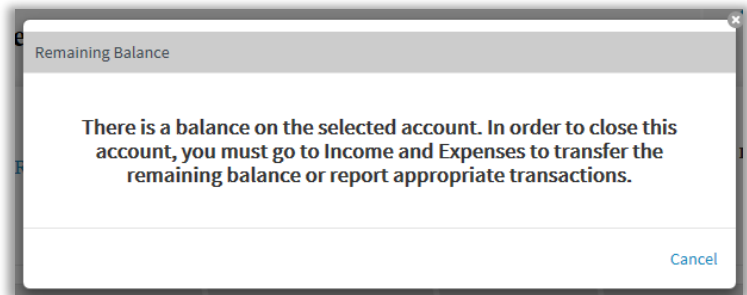
Save or Cancel

* = Required

Close

Visa Credit Card (\$2,468.00)

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.

Updating Information Regarding Receivables

1. From the Receivables tab, review and update information before submitting your account.
2. Under All Receivables, select the receivable that needs to be updated.
3. Update the Description, Value (if known), or Receivables Type.
4. Click Yes to report any receivables that have been fully paid/settled/closed during this reporting period.

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

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 the 'Real Estate' section of a software interface. At the top, there are navigation tabs: 'Financial Accounts', 'Income & Expenses', 'Receivables', 'Personal Property', 'Real Estate' (selected), and 'Review & Submit'. Below the tabs, there is a 'Files' section with the text 'There are currently no files uploaded.' and an 'Upload a File' button. The 'Real Estate' section has two buttons: 'Add Real Estate' and 'Export Real Estate'. On the left, under 'Real Estate Types', 'Cabin' is selected, with 'Vacation Home' listed below it. The main form area contains the following fields and questions:

- Description***: Cabin
- Real Estate Type**: Vacation Home
- Estimated Market Value***: \$ 2000000.00
- Is there a mortgage on the property?**: Yes No
- Is there rental income?**: Yes No
- Are there any liens or encumbrances on the property?**: Yes No
- Have you sold this Real Estate?**: Yes No (A red arrow points to this question)
- Tax Year**: 2022
- Add an Income Transaction for the real estate sale:**
 - Sale Date**: 11/01/2022
 - Sale Description**: Sale to Mary Roe
- Net Proceeds**: \$ 220000
- Proceeds Deposited Into**: Favorite Bank

Buttons at the bottom right: Delete, Save, or Cancel. A note at the bottom states: '* = Required'.

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 persons subject to conservatorship 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. Enter a response to clarify there is only one bond if appropriate.

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"/>

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**.

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.

7. Check the box indicating, "The Annual Notice of Rights was given to the person subject to conservatorship and the interested persons:"
 - a. In the text box, enter the interested persons 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 person subject to conservatorship and the interested persons.
 - iii. You may stop at any time during the submit process to complete this task.

8. Check the box indicating, "Criminal Background Accuracy".
 - a. If Yes, provide details of the change.
 - b. If No, click **Next**.

9. Check the box indicating, "Final Report" only when the conservatorship has terminated.

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

Affidavit of Service

A copy of the report has been given to **E THOMPSON** and the following interested parties:

(Separate names with a comma)

**You are required to serve a copy of this report on the protected person and interested parties. If you don't know who the interested parties are in your case, refer to the initial petition for appointment and M.S. 524.5-102 - see Subd. 7 or consult your attorney. If protected person cannot be served because they are deceased indicate in the comment box: "Protected Person deceased".*

Previous Next

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](#)

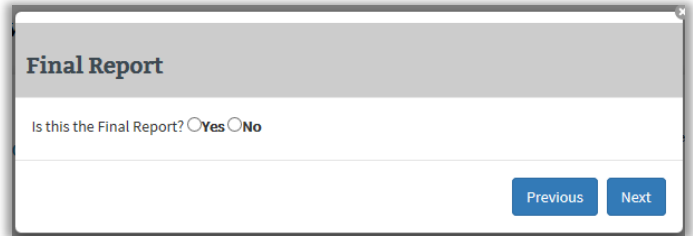
Previous Next

Criminal Background Accuracy

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

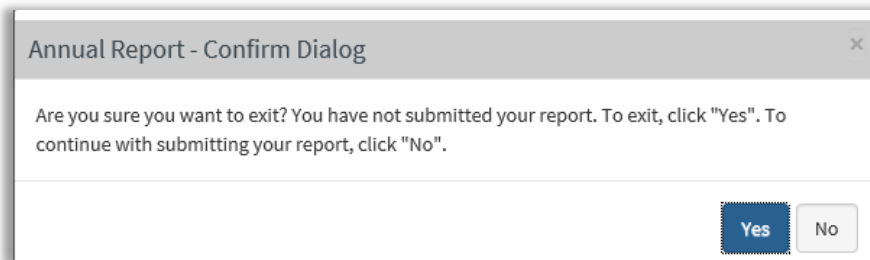
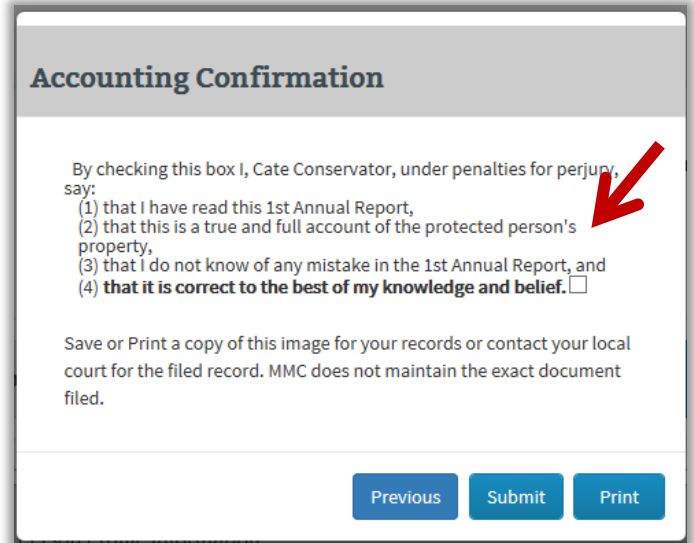
Previous Next

- 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](#)".

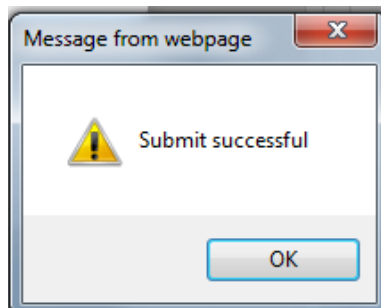


By checking the Accounting Confirmation box, you are stating, under penalties for perjury, that you:

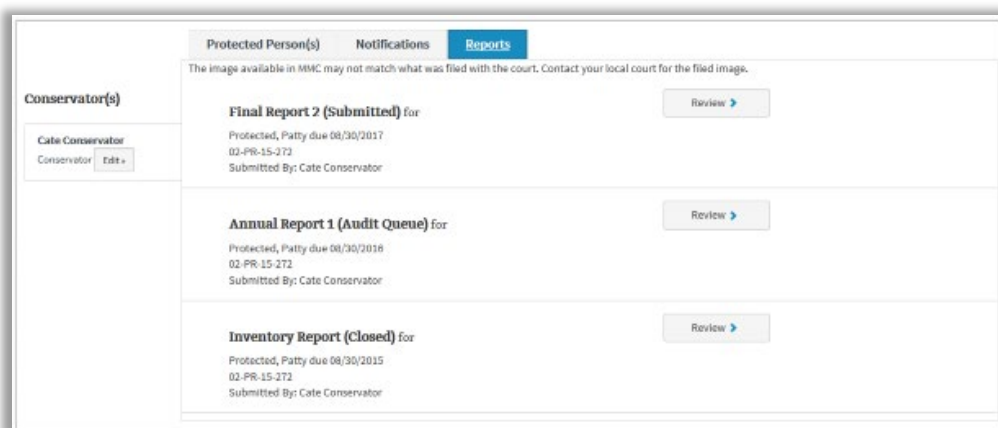
- c. have read this account report,
 - d. that this is a full accounting of all property belonging to the person subject to conservatorship,
 - e. that you do not know of any mistake in the report, and
 - f. that it is correct to the best of your knowledge and belief.
10. Here you may print a copy of the report, return to previous questions, go back and edit your account or submit the report.
11. If you return to the account, you will need to go through the submit process again.
12. If you select to leave you will receive the below warning.



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 review 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 on the "Contact Us" tab 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.

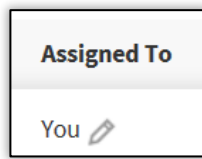
Previous Next

Appendix A: Designated Agents

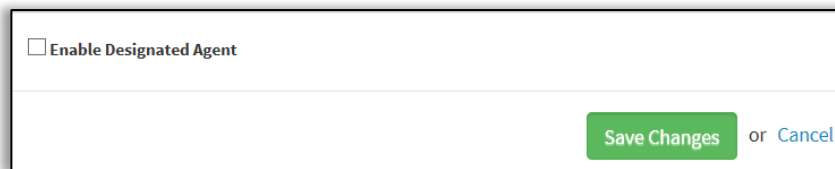
Designating an Agent

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 Receivables Information to a Spreadsheet

- From the Receivables tab, click **Export Receivables**.
- A pop up will ask "Do you want to open or save Receivable.csv from mmc.courts.state.mn.us?"
- Your options are Open, Save, or Cancel. Click **Open**.
- A spreadsheet of your receivables 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.

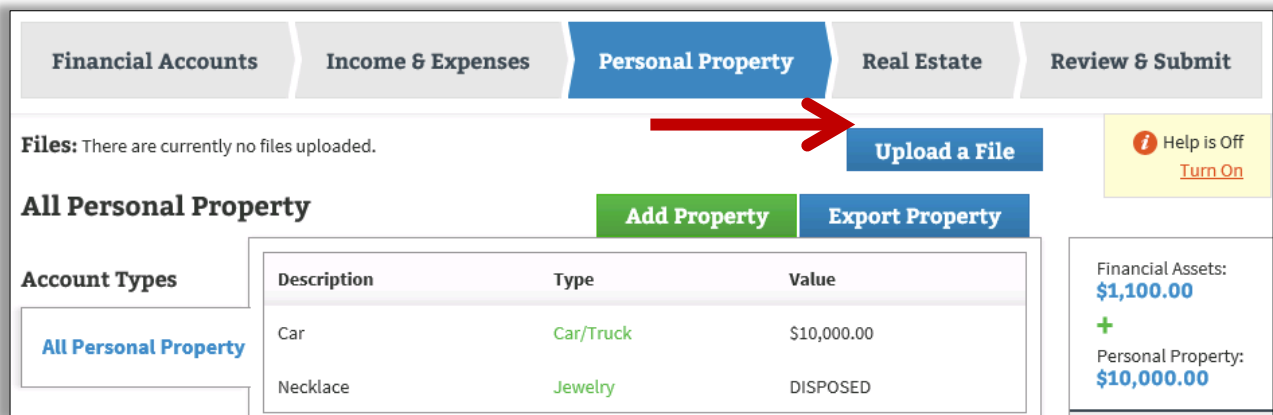
Appendix C: Uploading a File

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 conservator account review program 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.

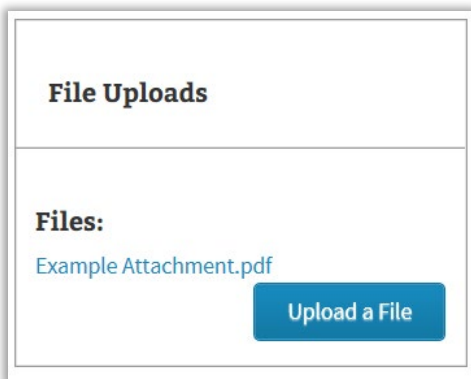
To upload a file:

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



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:

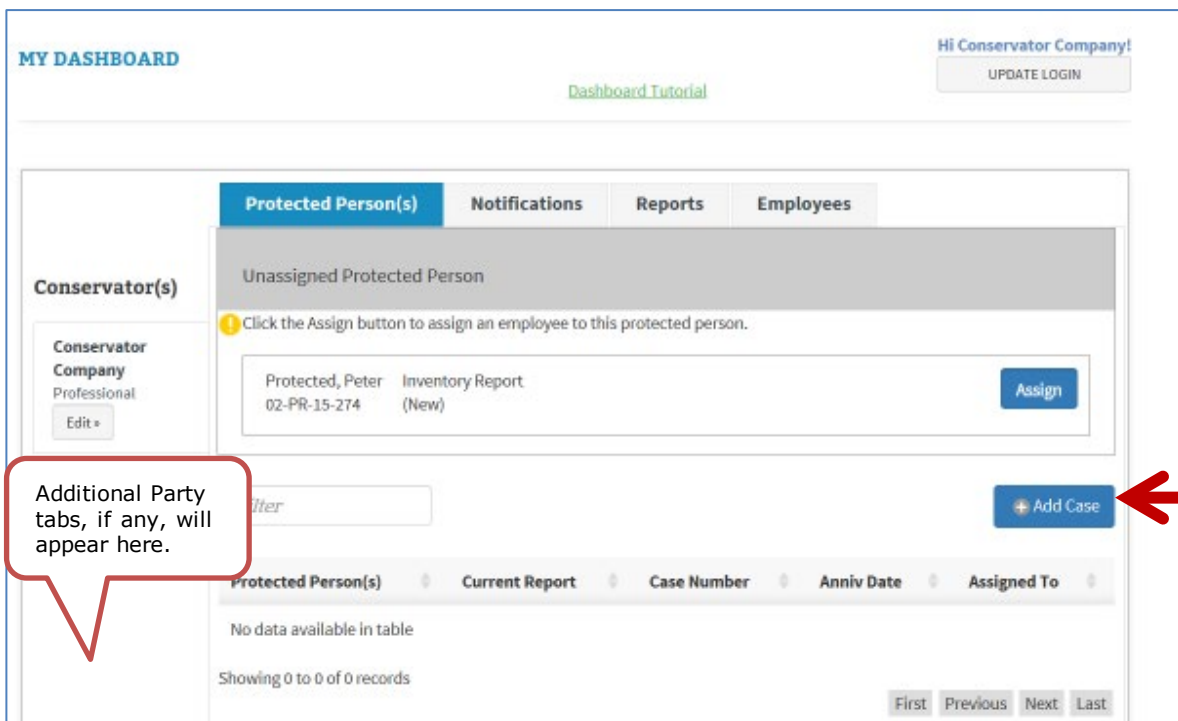


Appendix D: Professional Conservators

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.

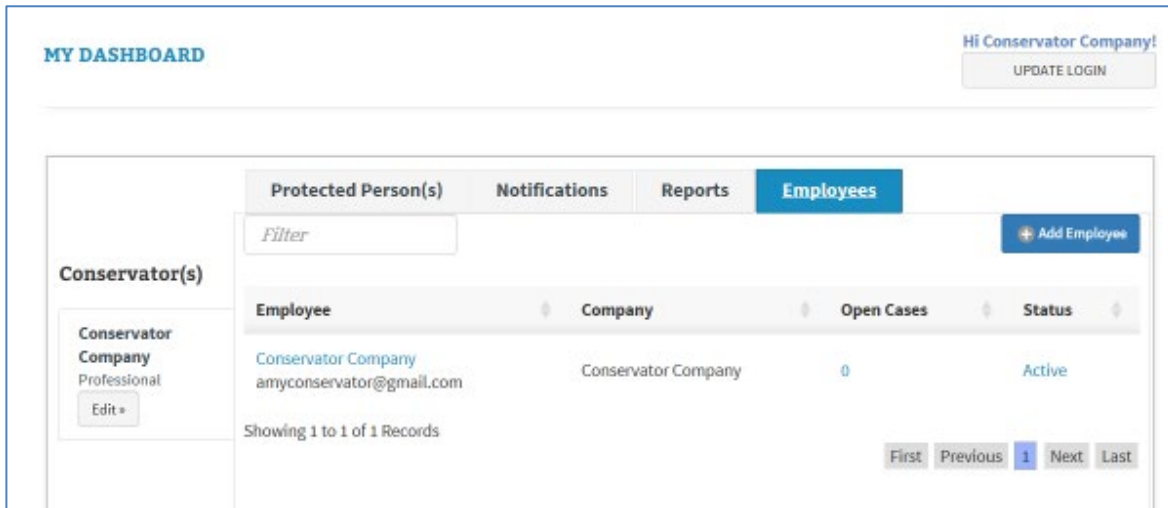
If MMC recognizes multiple party records from court records (MNCIS) for your name/company, you will see the name multiple times along the left side of the screen. The top tab on the left will identify "All." From the All tab, you can access all cases; however, you cannot assign cases from that tab. You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



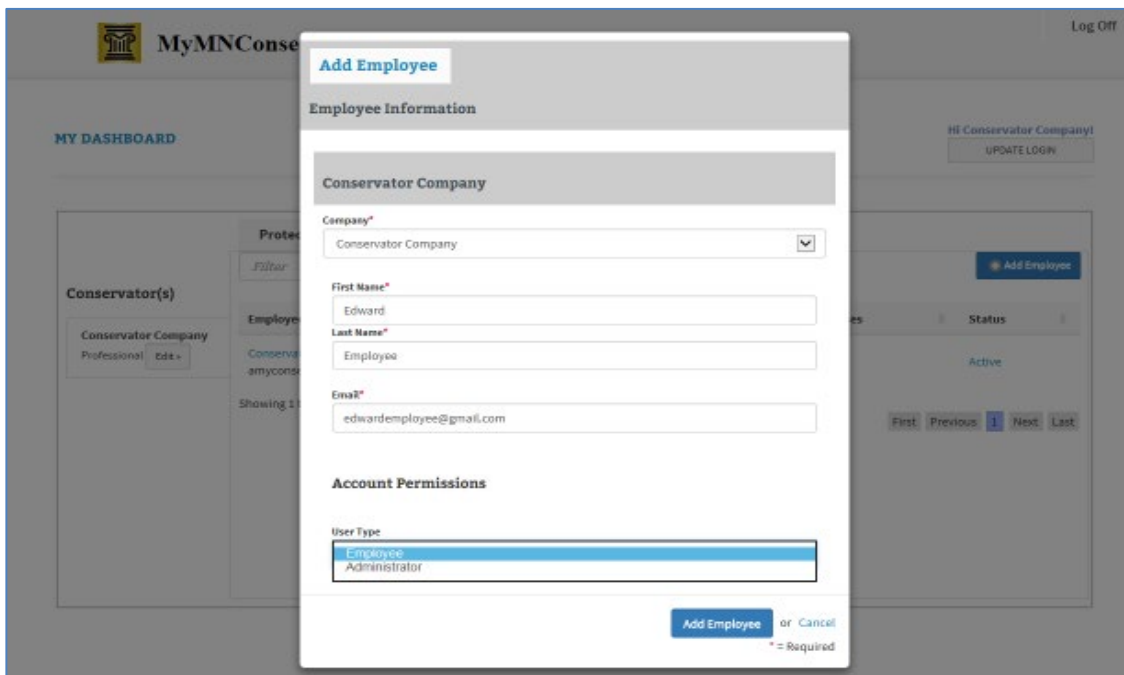
Adding Employees or Additional Administrator(s)

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

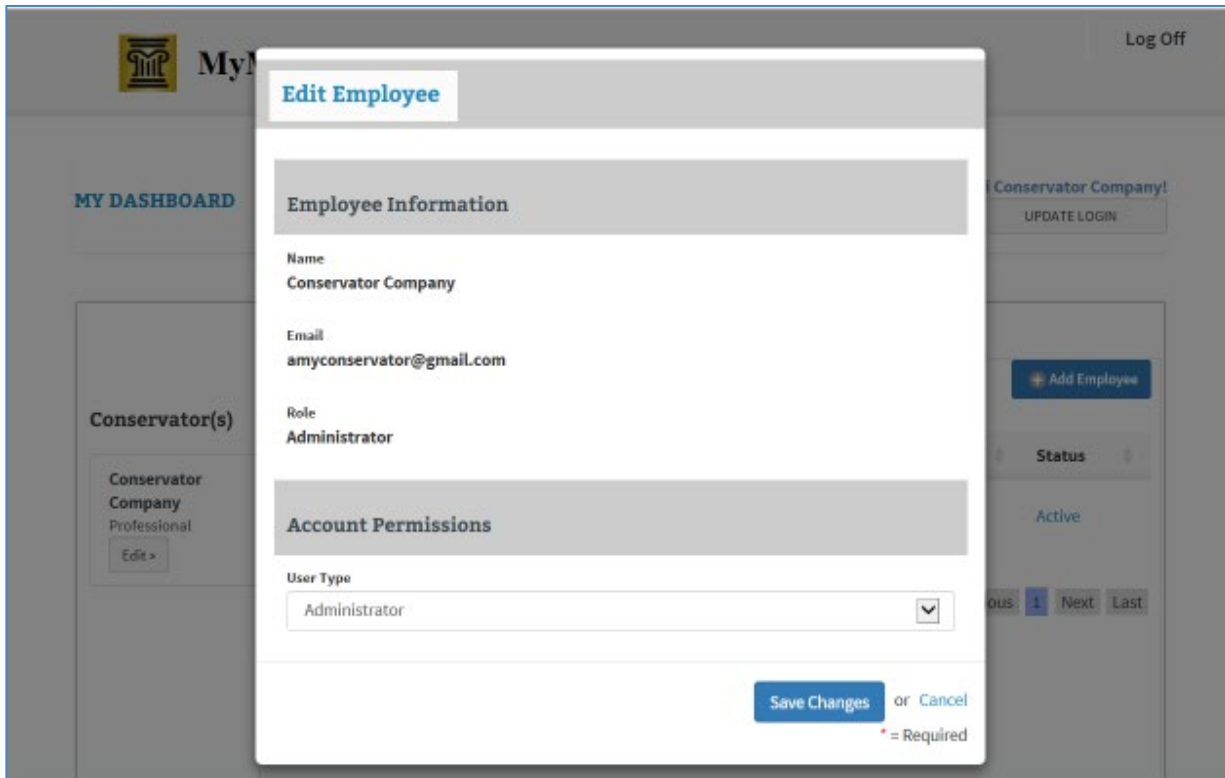


An administrator will be able to add and assign cases and add and deactivate employees.

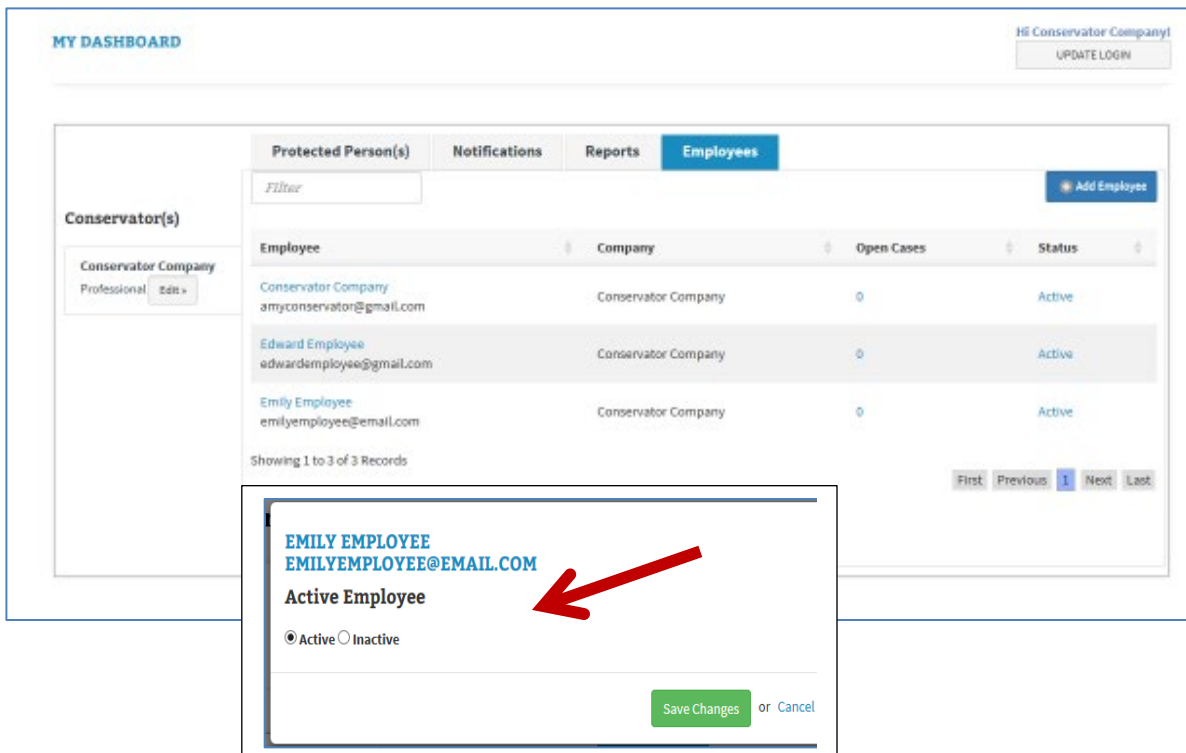
Identify the employee as an administrator (with rights to assign cases and add/deactivate employees) or as an employee (with access to work only on the cases that are assigned). You may have more than one administrator. In fact, it is a good idea to assign a second administrator in the event that one 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.”



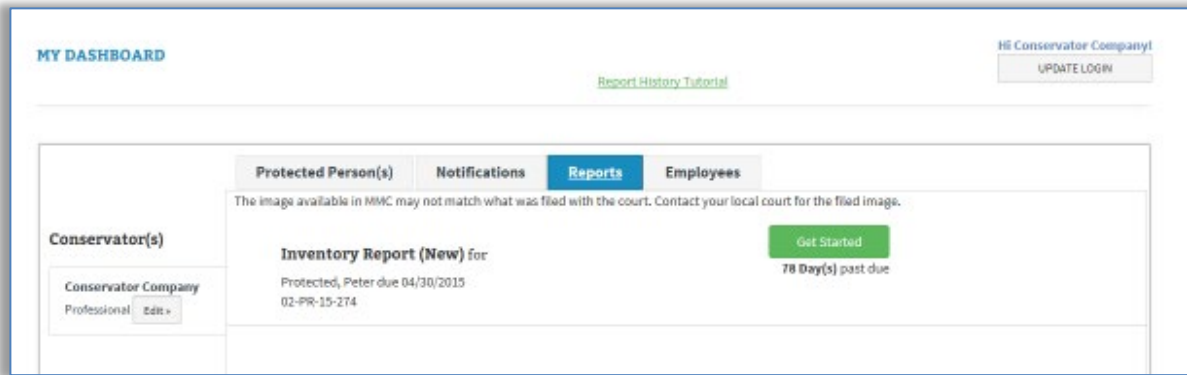
To make an employee inactive, change the status from active to inactive on the employee tab. You cannot make an employee inactive while cases are assigned.



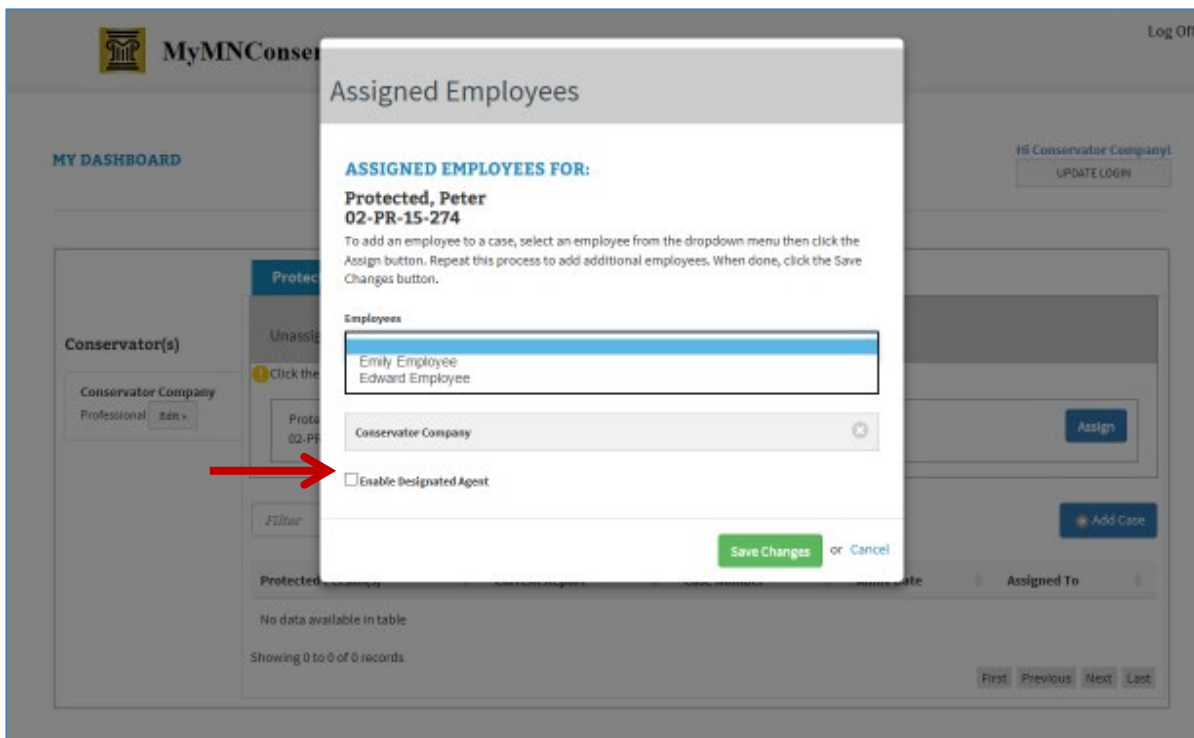
Assigning Cases

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.

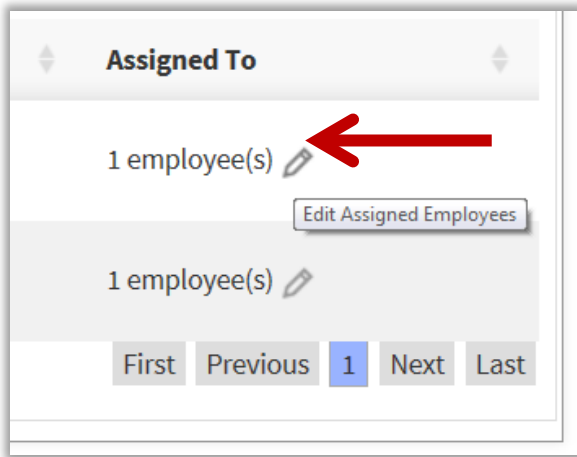
If a case has not yet been assigned, you can still work on the reports from the "Reports" tab.



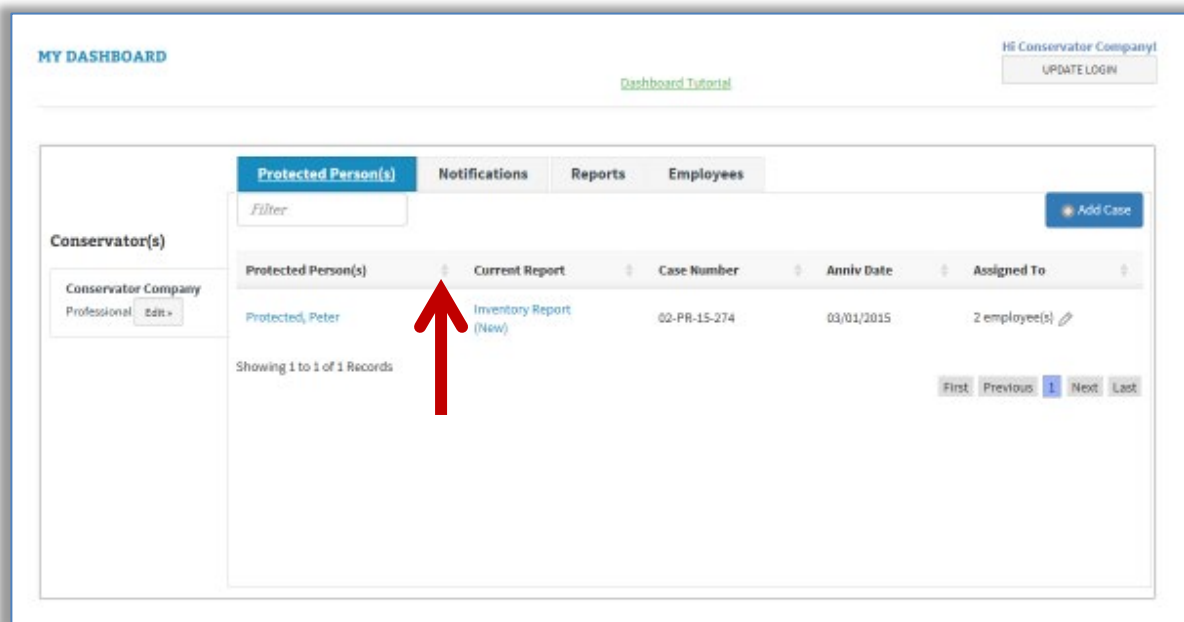
To assign employee(s), click on the assign button (from the conservator tab, not from the "All" tab). You can assign multiple employees. Also from the assign tab, you may enable the designated agent feature (see [Designated Agent](#) section).



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.



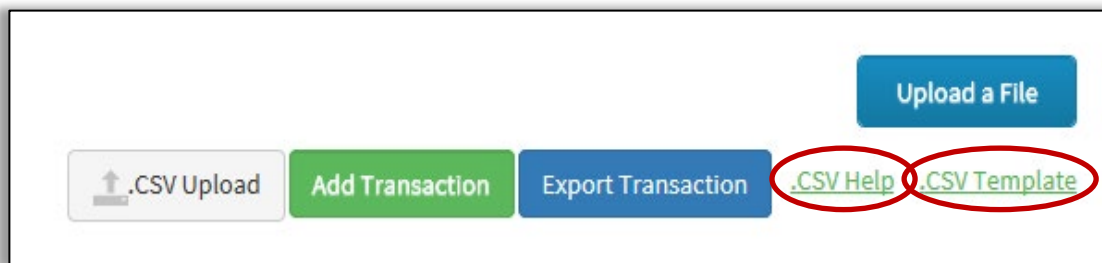
Appendix E: Entering Transactions via .CSV Upload


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 Is Income 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

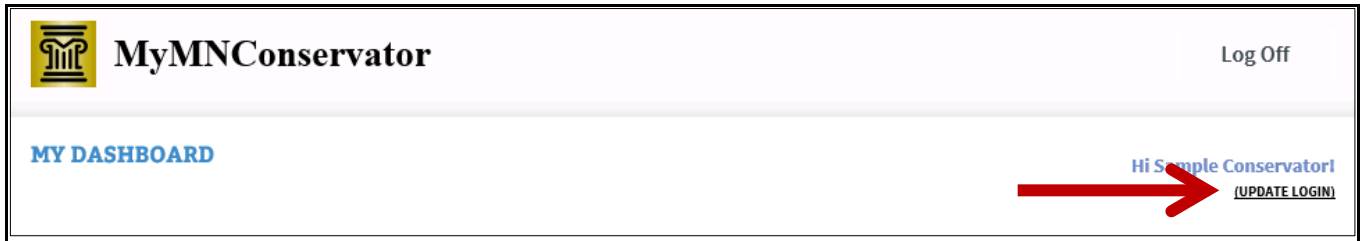
If you are unable to successfully upload your .csv file, please review the following to help resolve the issue.

- 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

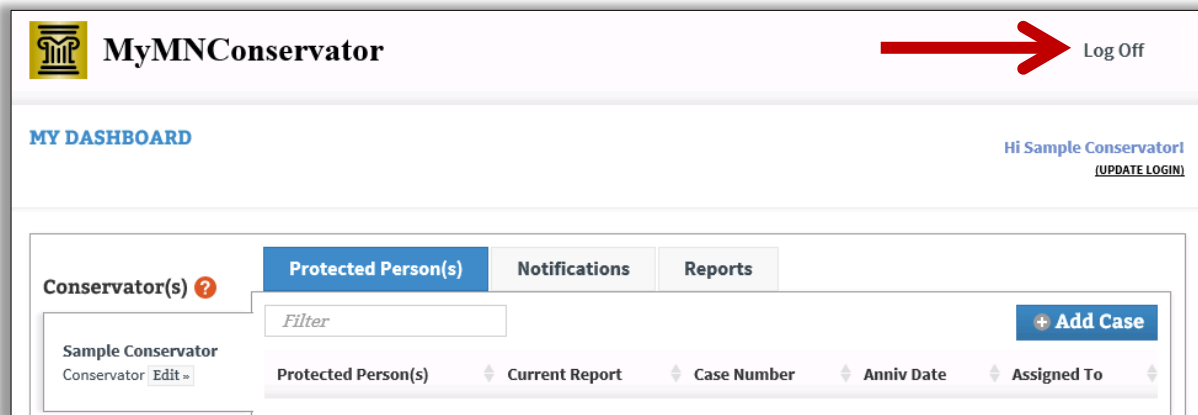
Updating Your MyCourtMN Information

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

IMPORTANT: These are general instructions on how to report the value of joint assets in which the person subject to conservatorship has an interest in MMC. This is not legal advice. Consult with an attorney and seek a court order for an appropriate determination if an allocation of the assets is needed (for example: to determine a portion should be distributed to the joint account holder or to determine what amounts should be subject to

Joint Accounts

A joint account is a financial account that is held in the name of more than one person, with each person having the right to deposit and withdraw funds. The conservator should never open a conservatorship account in the joint names of the conservator and the person subject to conservatorship. The conservator must establish a separate financial account (or accounts) 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 person subject to conservatorship (e.g. "John Doe Conservatorship, Jane Doe Conservator") but giving the conservator(s) control of the account(s).

Inventory

Identify a joint financial account by including the notation "joint" in the description field. Report the full value of the account as of the date of appointment.

Note:

Tangible personal property and real estate assets should be entered with the full 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/are in use, all transactions must be reported in MyMNConservator. If transactions in a joint account belong solely to the joint account holder who is not the protected person, they should be categorized "Joint Account Holder Income" or "Joint Account Holder Expense." Payments for joint expenses (for example: mortgage payments) should be entered using the specific category. You will be required to provide documentation pertaining to the joint account holder's transactions for audit purposes.

It is highly recommended that separate accounts be established and that you **DO NOT** continue to use joint accounts. **Do not terminate or alter an interest in joint assets without seeking a court order (Minn. Stat. §524.5-411(a)(8)).**

Appendix H: Receivable Type Descriptions

ABLE Account

If the person subject to conservatorship has an ABLE account established for their benefit and the conservator is NOT the administrator of the account, enter it here. Identify the name of the person that is the administrator of the ABLE account in the description. If the conservator IS the administrator, this account must instead be entered on the Financial Accounts tab.

Business Interest – Third Party Controlled

If the person subject to conservatorship holds an interest in a business that is NOT being managed by the conservator, enter it here. Identify the name of the business and the name and title of the person who is managing the business. If the conservator IS managing the business, the business account(s) must instead be reflected on the Financial Accounts tab.

Court Ordered Judgment

If the person subject to conservatorship has a court ordered judgment entered in their favor, enter it here. Identify the name of the party that owes the money and the court file number in the description.

Court Ordered Reimbursement

If the person subject to conservatorship was awarded reimbursement in a court order, enter it here. Identify the name of the party that owes the money and the court file number in the description.

Court Ordered Restitution

If the person subject to conservatorship was awarded restitution in a court order, enter it here. Identify the name of the party that owes the money and the court file number in the description.

Contract for Deed

If the person subject to conservatorship holds a contract for deed on real estate, enter it here. Identify the name of the party that is obligated to pay on the contract in the description.

Health Care Savings Plan

If the person subject to conservatorship has benefit of a health care savings plan where spending is restricted to qualifying health-related expenses, enter it here. Identify the name of the company that administers the plan in the description. If it is a health care savings account that is not restricted to qualifying health-related expenses, instead enter the account on the Financial Accounts tab.

Loan/Promissory Note

If the person subject to conservatorship is entitled to repayment under a formal or informal loan agreement or promissory note, enter it here. Identify the name of the person that owes the money in the description. If this is a written agreement, upload a copy of that agreement to the report.

Personal Spending Account

If a personal spending account in any form such as a checking account or prepaid/preloaded debit card or other has been established so that the person subject to conservatorship has access to funds for discretionary spending, enter it here. Enter the name of the bank, if applicable, and the type of account in the description.

Representative Payee - Railroad Pension

If the person subject to conservatorship receives a railroad pension and there is a named representative payee/fiduciary that is NOT the conservator, enter it here. Enter the name of the party that manages this asset in the description. If the conservator IS the representative payee/fiduciary or there is no named representative payee/fiduciary, this account must instead be entered on the Financial Accounts tab.

Representative Payee - Social Security

If the person subject to conservatorship receives social security and there is a named representative payee that is NOT the conservator, enter it here. Enter the name of the party that manages this asset in the description. If the conservator IS the representative payee or there is no named representative payee, this account must instead be entered on the Financial Accounts tab.

Representative Payee - Veterans Admin

If the person subject to conservatorship receives veteran's benefits and there is a named representative payee/fiduciary that is NOT the conservator, enter it here. Enter the name of the party that manages this asset in the description. If the conservator IS the representative payee/fiduciary or there is no named representative payee/fiduciary, this account must instead be entered on the Financial Accounts tab.

Trust - Other

If the person subject to conservatorship is the beneficiary of a trust other than a special needs or supplemental needs trust, enter it here. Enter the name of the trustee in the description. Any trust should be entered as a Receivable even if the conservator is also the trustee unless otherwise directed by the court.

Trust - Special Needs

If the person subject to conservatorship is the beneficiary of a special needs trust, enter it here. Enter the name of the trustee in the description. Any trust should be entered as a Receivable even if the conservator is also the trustee unless otherwise directed by the court.

Trust - Supplemental Needs

If the person subject to conservatorship is the beneficiary of a supplemental needs trust, enter it here. Enter the name of the trustee in the description. Any trust should be entered as a Receivable even if the conservator is also the trustee unless otherwise directed by the court .

UTMA/UGMA

If the person subject to conservatorship is the beneficiary of an UTMA (Uniform Transfers to Minors Act) or an UGMA (Uniform Gifts to Minors Act), enter it here. "UTMA/UGMA" accounts should be entered as a Receivable even if the conservator is also the custodian of the account.