Conservator Account Filing Administrator Manual

MINNESOTA JUDICIAL BRANCH

Conservator Account Filing Administrator Manual

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About Conservator Account Filing Administration

Access to the Conservator Application Administration system is restricted to authorized personnel only. The following functions are available to administrators:

click a link below for detailed instructions

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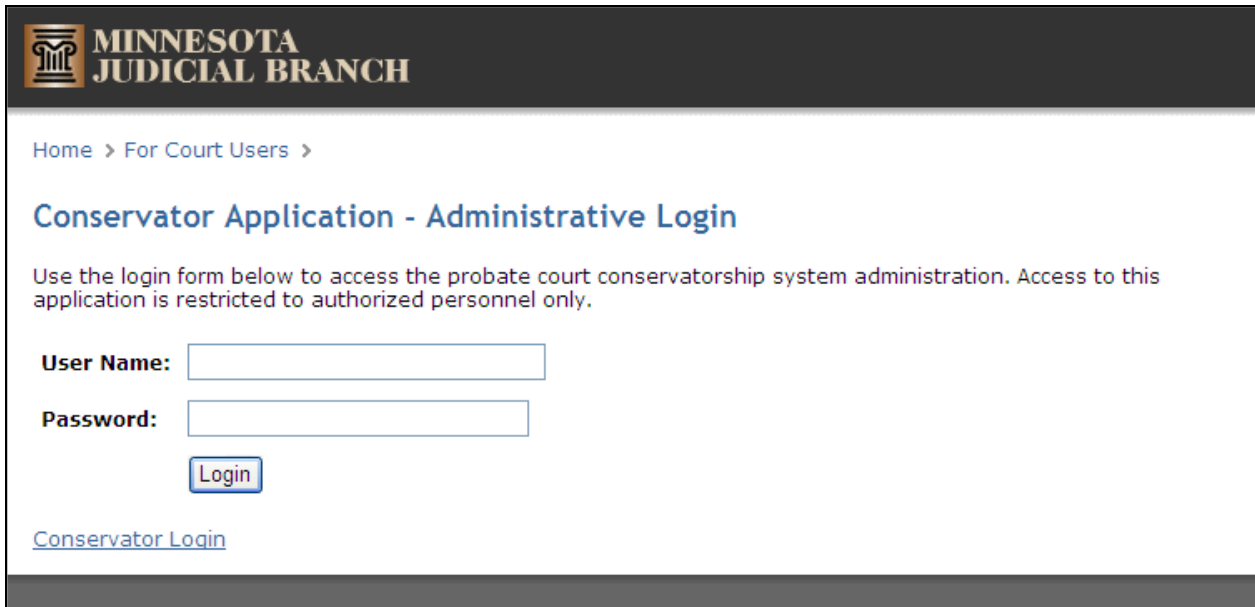
About this Document

This document is available in SharePoint:
https://teams2.courts.state.mn.us/SCA/mjbcollab/camper/default.aspx and provides instructions to administrators on how to perform administrator functions in the Conservator Account Filing system.

Logging In

1. Open the Web page by using the link provided to you with your login:
   http://conservatorship.courts.state.mn.us/RamseyProbate/Admin/Login/

2. The following web page will display. Type your username and password in the appropriate fields and click **Login**.

Update an Administrator's Profile
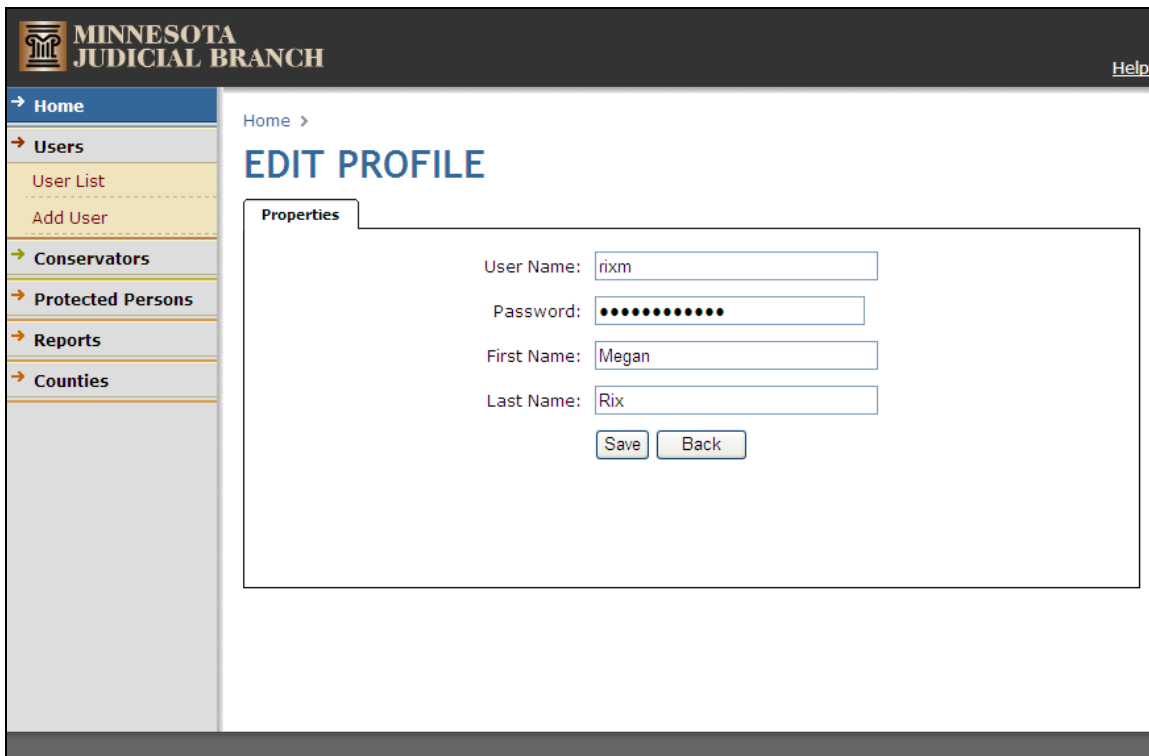
After logging in, the Administration Home page appears. Under System Administration, click **Edit My Profile** to update address and telephone information, and change your password if necessary.

Change any necessary contact information and click **Save**. If there are no changes, click **Back** to return to the Administration Home page.

Manage Existing Users

From the Administration Home page, under System Administration, click **Manage Existing Users**.

The Courts User List page appears listing all authorized users of the Conservator Account Filing system. From this page, the administrator may edit a user's account information or delete a user account. (Delete rights are not available to all court users.)

Editing User Detail

To edit user detail information, click **Edit**. The User Detail page appears. Change any necessary information and click **Save User**. (The ability to edit court users is only available to persons who have Administrator rights.)

Home > System Administration > User List >

USER DETAIL

Properties

User Name:	rixm
Password:	●●●●●●●●●●●●●
First Name:	Megan
Last Name:	Rix
Administrator?:	☑
Delete Privileges?:	☑

County:

Hennepin
Ramsey

Tip: Select multiple counties by holding the CTRL key and clicking the county.

Save User   Back

Deleting a User Account

To delete a user and prevent them from accessing the application, click **Delete**. A warning message appears indicating that this action cannot be undone. To continue, click **OK**. (Delete rights are not available to all court users.)

Windows Internet Explorer

Are you sure you want to delete this user?
This cannot be undone.

OK   Cancel
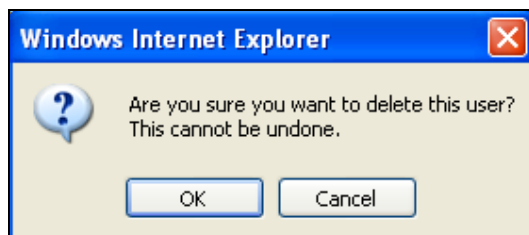
Add a New User Account

Court users can be added only by persons with Administrator rights.

1. User Names are entered in the following format: last name first initial, for example "smithj" for John Smith.

2. Enter a simple password the user can remember. Court users have the ability to change their own password from the My Profile page in the application. If the court user forgets their password, an Administrator can assign a new password.

3. Check the Administrator Checkbox to assign Administrator rights.

4. Check the Delete Privileges Checkbox to assign rights to delete Users, Conservators, Protected Persons, Reports, and Counties.

5. Click the county for which the court user will have rights to process reports. To select multiple counties, hold the CTRL key and click each applicable county.

6. Click **Add User**.

Home > System Administration > User List >

ADD USER

| Properties |

User Name:	
Password:	
First Name:	
Last Name:	
Administrator?:	☐
Delete Privileges?:	☐
County:	Hennepin Ramsey

Tip: Select multiple counties by holding the CTRL key and clicking the county.

[Add User] [Back]

Manage Counties

Counties can be added to the application, or existing county information can be edited or deleted by court users who have Administrator rights.

Home > System Administration > County List >

COUNTY LIST

Click the Edit link for a user to manage that county. Click the Delete link to remove a county.

Add County

County	County Code	District	Action
Hennepin	27	4th District	Edit | Delete
Ramsey	62	2nd District	Edit | Delete

Adding a County

1. From the County List page, click **Add County**. The Add County page appears.

2. Enter the County Name and County Code. (The County Code is the MNCIS County number.)

3. From the drop-down, select the District in which this county belongs.

4. Enter the courthouse Address, City, State, Zip and Phone.

5. Click **Add County**.

Home > System Administration > User List >

ADD COUNTY

Properties

Name: _____

Code: _____

District: 10th District ▾

Address: _____

Address 2: _____

Address 3: _____

Address 4: _____

City: _____

State: MN

Zip: _____

Phone: _____

Add County   Back

Editing County Detail

1. To modify existing county information, from the County List page, under Action, click **Edit** next to the appropriate county.

2. Change any pertinent information in the available fields.

3. Click **Save County**.

Home > System Administration > County List >

COUNTY DETAIL

Properties

Name:	Hennepin
Code:	27
District:	4th District ▾
Address:	Probate/Mental Health Division
Address 2:	Hennepin County Gov't. Center
Address 3:	400 Court Tower
Address 4:	300 South Sixth Street
City:	Minneapolis
State:	MN
Zip:	55487
Phone:	612-348-3244

Save County   Back

Deleting a County

A county may only be deleted if there are no Administrator users, conservator users, or conservatees associated with the county. If anyone is affiliated with the county in these capacities, the error message shown below will appear.

1. To delete a county, from the County List page, under Action, click **Delete**.

2. A warning message will appear. To continue, click **OK**.

Home > System Administration > County List >

COUNTY LIST

Click the Edit link for a user to manage that county. Click the Delete link to remove a county.

This county cannot be deleted because user(s) and/or conservatee(s) are associated with the county.

Add County

County	County Code	District	Action
Hennepin	27	4th District	Edit	Delete
Ramsey	62	2nd District	Edit	Delete

NOTE: Only court users with delete rights can see the delete link.

View Reports

Searching for a Submitted Report

To search among reports in the system, enter any known criteria.

1. Enter a date parameter to search reports that were filed during a specified time period.

2. From the drop-down, select a Status of either:

   a. Not Processed (saved, but not yet submitted to the court) or,

   b. Processed (submitted to the court).

3. From the drop-down, select a Filter of either:

   a. Protected Person Name (conservatee)

   b. Case Number

   c. Report Type

4. If using a Filter, in the Contains field, enter full or partial information.

5. Click **Search**.

Home > System Administration > Reports List >

REPORTS LIST

Filed Date Between (mm/dd/yy): [   ] and [   ]

Status: [Not Processed ▾]

Filter: [Protected Person Name ▾] Contains: [   ]

[Search]

Viewing a Submitted Report

1. Any records matching entered search criteria will appear on the Reports List page. The list may be sorted in ascending or descending order by clicking any of the column headings.

    a. Under Report Type, click a report name to view the report in PDF format.

    b. Under Protected Person, click the person's name to view their profile information in the Manage Protected Person page. Refer to the Managing a Protected Person section for more information.

    c. To delete a report, click the **Delete** link. (Only court users with delete rights can see the delete link.)

    d. To process a report and submit it to the court, click the checkbox next to the appropriate report(s) and click **Process Checked Items**.

Managing a Protected Person

Editing a Protected Person's Information

The Manage Protected Person page can be accessed from the Reports List page by clicking on a Protected Person's name or by clicking **Protected Person** from the navigation menu.

1. From the Properties tab, change any information as necessary.

2. Click **Update**. Fields with an asterisk are required in order to save.

   NOTE: The Beginning Balance field is to be used **ONLY** for the purpose of conversion to electronic filing in cases where the conservator filed previous paper accounts. Enter the ending balance from the last filed paper report as the Beginning Balance on this screen. This amount will then appear on the conservator's initial e-filed account.

Managing a Conservator's Information

From the Conservators tab, assign or un-assign a conservator for a particular case.

1. Under Assign a Conservator, click the drop-down and select from the list of conservators who should be assigned to the case.

2. After clicking **Assign**, the selected person's name will appear under Current Conservators.

Home › Protected Person List ›

MANAGE PROTECTED PERSON

| Properties | **Conservators** | Report History |

Using this form you can assign and unassign conservators for case number: **62-PR-10-UserManual [John Smith II]**.

ASSIGN A CONSERVATOR

| Select a Conservator | ∨ | Assign |

CURRENT CONSERVATORS

Conservator Name	Assignment Period	Action
John Trainer II	05/10/2010 - Current	Un-assign

NOTE: To un-assign a conservator from a case, under Action, click **Un-assign**.

Managing Report History for a Protected Person

From the Report History page, view a history of each action taken for all reports, either submitted or not submitted.

- Reports or Uploaded files that have not been submitted to the court may be deleted by clicking the Delete link. (Only users with delete rights can see the delete link.)

- Under Action, click an action link and the report will open in PDF format.

- For Uploaded Files, click **Download** to view the file.