

ADULT GUARDIANSHIP AND CONSERVATORSHIP EVENT CODE QUICK GUIDE

This Quick Guide is only a summary of event codes. If you need additional information, please refer to the Processing Adult Conservatorship/Guardianship Cases SOP.

Code	Description	Usage Notes
1513	OPN: Petition	Use when a new Petition for Guardian/Conservator or both is filed.
8981	CRT: G/C Information Sheet (Petition)	Use when the <i>Guardianship and Conservatorship Information Sheet</i> is submitted with the new petition.
8982	CRT: PQ New Case Acknowledgment Receipt	Use when the Judge or staff signs the <i>Acknowledgment Receipt</i> .
6495	NTC: Notice of Hearing and Rights	Use when the TCAA files the <i>Notice of Hearing and Rights</i> .
8277	ORD: Of Appointment	Use when an Order Appointing Guardian Ad Litem, Visitor and Health Care Professional is filed. (Enter as participants on parties tab – GAL attorney for ‘ITMO’ party)
9222	Sealed Qualified Health Care Professional’s Report	Use when the Qualified Health Care Professional report is filed. Image must be sealed.
9225	Sealed Visitor’s Report	Use when the Visitor files their report. Image must be sealed.
9226	Sealed Guardian Ad Litem’s Report	Use when the Guardian Ad Litem files their report. Image must be sealed.

Code	Description	Usage Notes
8386	ORD: Appointing Temporary Guardian	<p>Use when an Order Appointing Temporary Guardian is filed. If both the Temp Guardian and Conservator are appointed in a single order both event code 8386 and 8387 are docketed and the order scanned to both events.</p> <p>NOTE: Temp Guardian and Conservator are appointed for up to 60 days, with one 30 day extension allowed. Odyssey will auto calculate the expiration date based on the event code date.</p> <p>Once the judge appoints a Full/Temp Guardian and Conservator or dismisses the case, the clerk will need to complete the due date using the date the permanent order was filed.</p>
8387	ORD: Appointing Temporary Conservator	<p>Use when an Order Appointing Temporary Conservator is filed. If both the Temp Guardian and Conservator are appointed in a single order both event code 8386 and 8387 are docketed. Scan the order to both events.</p> <p>NOTE: Temp Guardian and Conservator are appointed for up to 60 days, with one 30 day extension allowed. Odyssey will auto calculate the expiration date based on the event code date.</p> <p>Once the judge appoints a Full/Temp Guardian and Conservator or dismisses the case, the clerk will need to complete the due date using the date the permanent order was filed.</p>
8388	NCJ: Order Appointing Full (Plenary) Guardian	<p>Use when an Order Appointing Full/Plenary Guardian is filed. If both the Guardian and Conservator are appointed in a single order both event code 8388 and 8389 are docketed. Scan the order to both events.</p>
8389	NCJ: Order Appointing Full (Plenary) Conservator	<p>Use when an Order Appointing Full/Plenary Conservator is filed. If both the Guardian and Conservator are appointed in a single order both event code 8388 and 8389 are docketed. Scan the order to both events.</p>

Code	Description	Usage Notes
8390	NCJ: Order Appointing Limited Guardian	Use when an Order Appointing Limited Guardian is filed. If both the Limited Guardian and Conservator are appointed in a single order both event code 8390 and 8391 are docketed. Scan the order to both events.
8391	NCJ: Order Appointing Limited Conservator	Use when an Order Appointing Limited Conservator is filed. If both the Limited Guardian and Conservator are appointed in a single order both event code 8390 and 8391 are docketed. Scan the order to both events.
8084	DUE: Conservator's Inventory (90 Day)	Create when an Order Appointing Conservator is filed.
8085	DUE: Guardian's Report (90 Day)	Create when an Order Appointing Guardian is filed.
8086	DUE: Annual Guardianship Report	Create when the initial Order Appointing Guardian is filed. This DUE Event will track when the first annual report is due.
8087	DUE: Annual Conservatorship Report	Create when the initial Order Appointing Conservator is filed. This DUE Event will track when the first annual report is due.
8088	DUE: 10 Year Review	Create when an Order Appointing Guardian/Conservator is filed. After the initial 10 Year Review is completed, create a new DUE Event to track when the next 10 year review is due.
8385	ORD: Identifying Persons Entitled to Notice and Access	Use when an <i>Order Identifying Persons Entitled to Notice and Access to Court Records</i> is filed. Remember to remove any parties from the Parties tab who are not listed on the judge's order as they are no longer entitled to receive notice and access to the file.
6601	NTC: Notice of Firearm Restriction	Use when a <i>Notice of Federal Restriction on Right to Possess or Receive a Firearm or Ammunition</i> is filed.
8395	ORD: Secure or Waive Bond	Use when an <i>Order to Secure or Waive Bond</i> is filed.

Code	Description	Usage Notes
8083	DUE: Conservator's Proof of Bond	Create when an <i>Order to Secure or Waive Bond</i> is filed.
6547	NTC: Conservator's Notice of Bonding	Use when the <i>Conservator's Notice of Bonding</i> is filed. Remember to completed DUE Event (8083).
8699	Statement	Use when a <i>Corporate Surety Statement</i> is filed.
9555	CRT: Adult Guardian/Conservator Case Checklist	Use when the checklist has been completed, signed and filed.
8966	90 Day Guardian's Report	Use when the <i>Guardian's Report</i> is filed and the "90-day" check box is selected.
9220	90-Day Conservator's Inventory	Use when the <i>Conservator's Inventory</i> is filed.
9219	Guardian's Annual Report	Use when the <i>Guardian's Report</i> is filed and the "Annual" check box is selected. Remember to complete the previous 'DUE' event (8086) and create a new "DUE" event (8086) for the following year.
9221	Conservator's Annual Report	Use when the <i>Conservator's Report</i> is filed. Remember to complete the previous 'DUE' event (8087) and create a new "DUE" event (8087) for the following year.
9227	Guardian's Final Report	Use when the <i>Guardian's Report</i> is filed and the "Final" check box is selected. Do not create a new 'DUE' event.
9228	Conservator's Final Report	Use when the <i>Conservator's Report</i> is filed and on page 2, if the check box "Yes" is selected for "Is this a Final Report?". Do not create a new 'DUE' event.
9229	CRT: Judicial Review of Guardian/Conservator Annual Report	Use when the <i>Judicial Review of Guardian/Conservator Annual Report</i> is filed.

Code	Description	Usage Notes
8207	ORD: Extending Time	Use when an Order Extending Time to file reports is granted. Remember to adjust the due date on the 'DUE' event of the report for which the extension has been granted.
9223	RCT: Motion/Petition to Reactivate	<p>Use when:</p> <ul style="list-style-type: none"> a) Motion is filed by the Guardian and/or Conservator because they are unable or unwilling to serve in this capacity; or b) Someone files a motion to replace/remove the Guardian and/or Conservator due to misappropriation of funds, fraud, failure to follow court orders, or other failures to follow duties and responsibilities. <p>Verify the cases status updated to RPN.</p>
8392	NCJ: Denying MTN/PET – Conservator/Guardian Appt. Continued	<p>Use when a motion to replace/remove Guardian/Conservator is not granted.</p> <p>Verify the case status updated to Adjudicated Case – Report Review</p>
9224	RCT: Grievance Filed	Use when Form 4-999.1 <i>Grievance About Guardian, Conservator, or Representative Payee</i> is filed. Verify the cases status updated to RPN.
8394	ORD: of Referral for Review/Audit	Use when the judge files an order referring the case to the Office of the State Auditor for review.
8072	DUE: Audit Review/Report	Create when an ORD: of Referral for Review/Audit is docketed. Odyssey will auto calculate the due date for 45 days from the event date of the order (8394).

Code	Description	Usage Notes
9100	Report of Review / Audit	Use when the Office of the State Auditor files a letter upon completion of their review of the case. Complete the DUE: Audit Review/Report event with the date the letter was filed.
2534	RPN: Petition/Motion to Seal Guardianship/Conservator	Use when a Petition/Motion to Seal the Guardianship/Conservatorship is filed. Verify the case status updated to RPN. See SOP titled “Sealing Guardianship/Conservatorship Cases” for further instruction.
3020	CLS: Order to Seal Guardianship/Conservator Case	Use when the Motion to Seal Guardianship/Conservatorship is granted. Docketing this event will close the case and update the case security group to PQ Sealed Conservator/Guardianship Case. See SOP titled “Sealing Guardianship/Conservatorship Cases” for further instruction.
3559	CLS: Order, Application, Petition or Motion Denied	Use when an application, petition, or motion is denied.
3483	CLS: Termination of Guardianship/Conservatorship	Use when the Guardianship and/or Conservatorship is no longer needed because the Protected Person is capable of taking care of their own affairs.
3484	CLS: Protected Person Deceased	Use when an order is filed indicating that the Protected Person is deceased.