

## Ohio Guardianship Forms Version 5 – Opening Screen

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**General Information Worksheet**

**Case Information**

County Name: Cuyahoga  
Subtitle/Caption: Presiding Judge Philip T. Justice  
Probate Judge: Philip T. Justice  
Guardianship Name: Spencer G. Ward  
Case number: 96-5865468

**Applicant:**

Name: Franklin E. Applicant  
Address: 1234 Main Street  
City: Cleveland County: Cuyahoga  
State: Ohio Zip Code: 44111  
Phone: 440-572-0000 Age: 43  
Soc Sec No: 123-45-4569

**Ward:**

Name: Spencer G. Ward  
Address: 4321 Maybelline Place  
City: Cleveland County: Cuyahoga  
State: OH Zip Code: 44107  
Phone: 216-221-2447 Age: 10  
Date of Birth (MM/DD/YY): 10/26/1999

You won't have much difficulty getting up to speed in **Ohio Guardianship Forms**. The startup screen or main window, which you see above, is not only ready for you to begin entering data, the tree view on the right side of the screen provides you with a detailed outline you can follow to complete your guardianship forms. Although manual and help files are readily available from **OGF's** Help menu, you might not need them because data entry is intuitive and the step-by-step overview in the tree view is always there to guide you. In fact, in tree view's expanded state (which is shown above) every form and worksheet is only a click away.

The main window is fantastic to work with on a desktop computer, but what about laptops, notebooks and ultrabooks? **OGF** has got those devices covered too. Everything that you can do conveniently with your mouse on a desktop (like navigating and clicking in the tree view) can also be performed just as easy from the keyboard using the menus, keyboard shortcuts, and accelerator keys.

**Example Asset/Receipt/Income Worksheet on next page**

## Example Asset/Receipt/Income Worksheet

**Asset Worksheet**

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**Navigator (Shortcut = Shift + Function key shown)**

First <F1>	Prior <F2>	Next <F3>	Last <F4>	Insert <F5>	Delete <F6>	Add <F7>	Clear Worksheet	Close Worksheet
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<p><b>Description</b></p> <p>Strongsville Savings Money Fund No 12-57-46-2029</p>	<p><b>Destination forms &amp; categories</b></p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;"><input checked="" type="checkbox"/> Send to Form 15.5 as</td> <td style="width: 50%;">Personal property</td> </tr> <tr> <td><input checked="" type="checkbox"/> Send to Form 15.8 as</td> <td>Funds &amp; assets</td> </tr> <tr> <td><input checked="" type="checkbox"/> Send to Form 16.0 as</td> <td>Personal property</td> </tr> <tr> <td><input checked="" type="checkbox"/> Send to Form 17.0 as</td> <td>Personal property</td> </tr> <tr> <td><input checked="" type="checkbox"/> Send to Form 22.0 as</td> <td>Personal property</td> </tr> </table>	<input checked="" type="checkbox"/> Send to Form 15.5 as	Personal property	<input checked="" type="checkbox"/> Send to Form 15.8 as	Funds & assets	<input checked="" type="checkbox"/> Send to Form 16.0 as	Personal property	<input checked="" type="checkbox"/> Send to Form 17.0 as	Personal property	<input checked="" type="checkbox"/> Send to Form 22.0 as	Personal property	<p><b>Date (MM/DD/YY)</b></p> <p style="text-align: center;">12/9/2008</p> <hr/> <p><b>Value or amount</b></p> <p style="text-align: center;">\$50,500.69</p>
<input checked="" type="checkbox"/> Send to Form 15.5 as	Personal property											
<input checked="" type="checkbox"/> Send to Form 15.8 as	Funds & assets											
<input checked="" type="checkbox"/> Send to Form 16.0 as	Personal property											
<input checked="" type="checkbox"/> Send to Form 17.0 as	Personal property											
<input checked="" type="checkbox"/> Send to Form 22.0 as	Personal property											

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Date	Description	Send To	Amount
12/9/2008	Strongsville Savings Money Fund No   12-57-46-2029	15.5, 15.8, 16.0, 17.0, 22.0	\$50,500.69
4/16/2008	Chicago Trust Money Market Certificate #   49381-282	15.5, 15.8, 16.0, 17.0, 22.0	\$80,000.00
9/23/2008	Chicago Trust Savings Account #   84-348788C	15.5, 15.8, 16.0, 17.0	\$80,000.00
10/14/2008	1996 Honda Civic Automobile	15.5, 15.8, 16.0, 17.0	\$14,750.00
12/11/2008	Ameritrust Bank, Certificate of Deposit, Account No. 35-3938490	15.5, 15.8, 16.0, 17.0	\$50,157.00
1/5/2009	Society National Bank, Certificate of Deposit No. 12-3938-1839	15.5, 15.8, 16.0, 17.0	\$25,000.00
2/3/2009	Household goods, furniture and furnishings	15.5, 15.8, 16.0, 17.0	\$25,000.00
2/4/2009	Microsoft Common Stock, 300 Shares at \$86.00 per share	15.5, 15.8, 16.0, 17.0	\$35,000.00
5/4/2009	National City Bank, Investor's Account Number 44-402394-21	15.5, 15.8, 16.0, 17.0	\$110,550.00
5/10/2009	Ameritrust, Checking account #949-32029	15.5, 15.8, 16.0, 17.0	\$7,500.00
5/12/2009	150 Shares of Fidelity Magellen at \$119.00 per share	15.5, 15.8, 16.0, 17.0	\$100,000.00
5/12/2009	Bank One, Certificate of Deposit #948912	15.5, 15.8, 16.0, 17.0	\$75,000.00
5/13/2009	Society Corporation Checking Account   Account Number: 938-2939	15.5, 15.8, 16.0, 17.0, 22.0	\$41,500.00
5/23/2009	Ameritrust Corp, IRA Account No. 34-12834	15.5, 15.8, 16.0, 17.0	\$45,502.00
5/25/2009	Cleveland Trust Bank, Certificate fo Deposit #4943-3929	15.5, 15.8, 16.0, 17.0, 22.0	\$55,000.00
6/18/2008	Situated in the City of Ridgland, County of Cuyahoga, State of Ohio, and know	15.5, 15.8, 16.0, 17.0, 22.0	\$241,100.00

Users of prior versions of **OGF** are no strangers to the worksheets. However, there are a few new and nifty features of these worksheets that are designed to make your work go easier and faster. First of all is the fact that we've done away with the **Save To Table** button. Saving to the table is now automatic when you leave a field or close the worksheet the information is transferred to the database without needing to be watchful or reminded about saving your last entry. Of course, not having to do the extra click to save your information makes data entry that much quicker.

In most other respects, these new worksheets are the same as they always were – with one cool exception. Although you could always copy and paste individual fields within the worksheets, now we provide you with the ability to copy, paste-replace, and paste-insert whole rows of the worksheet without needing to work with the individual fields separately.

**Example Expense/Debt/Disbursement Worksheet on next page**

## Example Expense/Debt/Disbursement Worksheet

Expense Worksheet

County Name:      Month:

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**Navigator (Shortcut = Shift + Function key shown)**

First <F1>	Prior <F2>	Next <F3>	Last <F4>	Insert <F5>	Delete <F6>	Add <F7>	Clear Worksheet	Close Worksheet
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<p><b>Description</b></p> <p>Green Works Inc. Lawn Care, annual yard maintainance</p>	<p><b>Destination forms</b></p> <p><input checked="" type="checkbox"/> Send to Form 15.8</p>	<p><b>Date (MM/DD/YY)</b></p> <p style="text-align: center;">5/1/2009</p> <p><b>Voucher</b></p> <p style="text-align: center;">1012</p> <p><b>Value or amount</b></p> <p style="text-align: center;">\$100.00</p>
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Date	Description	Voucher	Amount	Form 15.8
5/1/2009	Green Works Inc. Lawn Care, annual yard maintainance	1012	\$100.00	X
5/2/2009	Cuyahoga County Probate Court filing fees	1001	\$125.00	X
5/3/2009	The Franklin Fidelity Company of New York, fiduciary's bond	1002	\$600.00	X
5/4/2009	Medina General Hospital	1003	\$115.00	X
5/5/2009	Emergency Specialists, Inc. emergency room physicians	1004	\$75.00	X
5/6/2009	X-Ray Diagnostics, Inc. X-Ray facility	1005	\$56.00	X
5/7/2009	Joseph & Joseph, Inc. X-Ray Diagnostic	1006	\$750.00	X
5/8/2009	Barnes & Noble, educational, school, book expenses	1010	\$201.00	X
5/9/2009	Family Emergency Physicians Health Network	1011	\$107.50	X
5/10/2009	City of Cleveland, sewer bill	1013	\$72.04	X
5/11/2009	Division of Water: water bill	1014	\$44.29	X
5/12/2009	Time Warner Cable, telephone bill	1100	\$74.00	X
5/13/2009	Medina County Auditor, realty tax	1101	\$203.15	X
5/14/2009	Wellington Health Specialist, medical care	1102	\$74.19	X
5/15/2009	Internal Revenue Services, 2nd quarterly estimate	1103	\$400.00	X
5/16/2009	VISA, Household CC payment	1104	\$775.69	X

Everything that we said about the **Asset Worksheet** on the previous page is true of the **Expense Worksheet** shown above. There's no **Save to Table** button and copy/paste functionality is available with respect to whole rows of the worksheet instead of individual fields. That makes your data entry proceed that much faster. Your accountings will go smoother than ever before.

**Example Time & Services Worksheet on next page**

## Example Time & Services Worksheet

**Time Worksheet**

**Navigator (Shortcut = Shift + Function key shown)**

First <F1>	Prior <F2>	Next <F3>	Last <F4>	Insert <F5>	Delete <F6>	Add <F7>	Clear Worksheet	Close Worksheet
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<p><b>Description of services</b></p> <div style="border: 1px solid gray; padding: 5px; min-height: 80px;"> <p>Receive motion for expenses by mail.</p> </div>	<p><b>Date (MM/DD/YY)</b>  <input style="width: 100%;" type="text" value="2/1/2008"/></p> <p><b>Time spent</b>  <input style="width: 100%;" type="text" value="0.10"/> <small>Enter time spent as a decimal number, i.e., 15 minutes equals 0.25 hours</small></p> <p><b>Hourly rate</b>  <input style="width: 100%;" type="text" value="\$50.00"/></p>
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Date	Description	Time Spent	Hourly Rate
2/1/2008	Receive motion for expenses by mail.	0.10	\$50.00
2/8/2008	Telephone guardian rgard progress on updated files.	0.50	\$100.00
2/11/2008	Assemble files and sort through motions	2.00	\$50.00
2/14/2008	Telephone conversation with guardian updating progress on files.	1.00	\$42.00
3/10/2008	File to Motion to modify.	1.00	\$100.00
3/12/2008	Office visit with guardian about bank accounts.	1.25	\$100.00
3/14/2008	File extended motion for visitation.	1.00	\$25.00
4/10/2008	Still testing the same feature usiing differing lengths of text and noticing that the test criteria mista	0.12	\$150.00
11/7/2008	Testing the new default rate feature	1.00	\$25.00
2/5/2009	Telephone conversation with guardian ad litem regarding scheduled Court hearing	0.25	\$100.00
3/6/2009	Balance bank accounts and call bank about missing check.	1.25	\$50.00
4/29/2009	Letters to guardian's siblings regarding expenses.	5.00	\$50.00
5/14/2009	Type letters regarding guardian's living expenses.	2.00	\$100.00
5/14/2009	Balance Bank Accounts	1.00	\$50.00
8/24/2009	Modify motion to modify	1.00	\$150.00
8/28/2009	Receive addition information by mail	1.00	\$150.00

The Time Worksheet is great for keeping track of the services you render on behalf of the guardianship. Of course, everything we've said about the **Asset Worksheet** and the **Expense Worksheet** on the previous pages is true of the **Time & Services Worksheet** shown above. There's no **Save to Table** button and copy/paste functionality is available with respect to whole rows of the worksheet instead of individual fields.

Note that you need not make your entries in chronological order; the **Time Worksheet** will do that for you automatically regardless of the order in which you make your entries. And while it's handy to be able to keep a detailed log of your services, **OGF** uses this information to print the following reports:

- Application for Attorney Fees
- Judgment Entry for Attorney Fees
- Exhibit of Time & Services without hourly rate that can be attached to your Application for Attorney Fees (when attorney fees are governed by local rule)
- Exhibit of Time & Services without hourly rate that can be used in any way you want