

Franklin County Probate Court Guide to E-Filing Guardian's Annual Report

E-Filing Guardian's Annual Report

THIS PRESENTATION IS A GUIDE SHOWING HOW TO E-FILE GUARDIAN'S ANNUAL REPORT

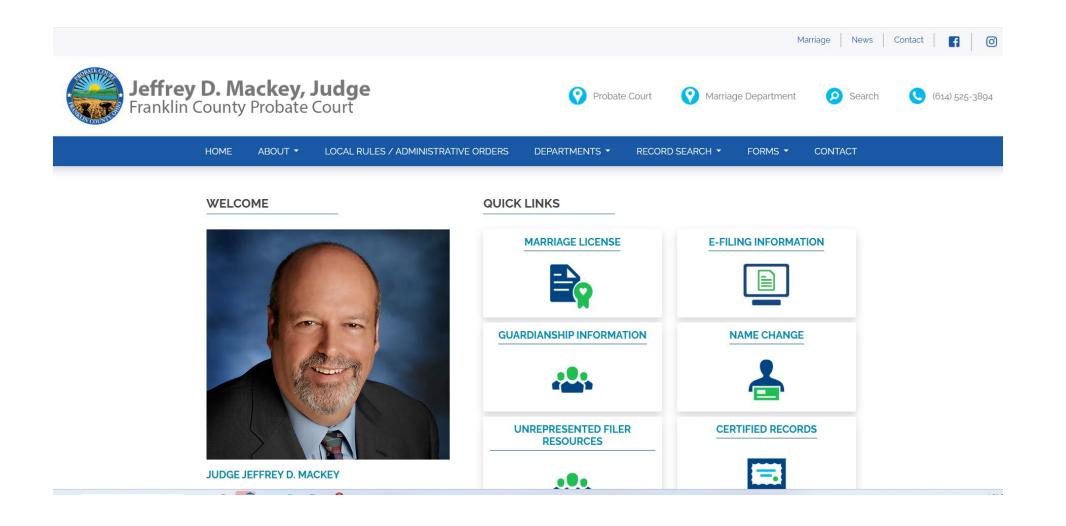
THIS PRESENTATION WILL WALK YOU THROUGH EACH SECTION AND SHOW YOU WHAT FORMS ARE NECESSARY FOR THIS PROCESS

IF YOU HAVE ANY QUESTIONS OR CONCERNS AFTER REVIEWING THIS PRESENTATION, PLEASE CONTACT OUR OFFICE



Connect to our website

https://probate.franklincountyohio.gov/home





Where to go

 Select Guardianship Information





 Then Select Guardianship Forms





 Scroll down and select Guardian's Annual Report

Form Number	Form Name
ere-u-15.4c	Necelpt-and-Netease-of-Att-Ctalins-(custodiat)
	GUARDIANSHIP - ANNUAL REPORTING
PC-G-17.7A	Guardian's Annual Report
PC-G-27.8	Annual Guardianship Plan - Estate
PC-G-27.7	Annual Guardianship Plan - Person
PC-G-27.5	Annual Registration Guardian Ten or More Wards
PC-G-27.6	Guardian with Ten or More Wards Annual Fee Schedule



Documents



SEE THE LIST OF GUARDIANSHIP FORMS



PRINT OUT GUARDIAN'S ANNUAL REPORT AND COMPLETE IT FULLY



PRINT OUT STATEMENT OF EXPERT EVALUATION AND HAVE THE APPROPRIATE MEDICAL PROFESSIONAL COMPLETE IT



SAVE AS (2) INDIVIDUAL PDF FILES



Guardian's Annual Report

PC-G-17.7A (Rev. 4-2017)

PF	ROBATE	COURT OF FRA	NKLIN COUNTY, OHIO	
IN THE MATTE				
CASE NO.				
		GUARDIAN'S ANN [R.C. 2111	UAL REPORT	
The undersigned, gu	ardian of the a	bove-named ward, states that	t my annual report to the Court is as follow	s:
Ward's age:	Ward's	date of birth:		
Ward's Address:	Name of Facility,	if applicable		
	Street			
	City, State, Zip C	ode		
	Telephone Numb	er and Area Code		
Ward's residence is:				
own home		group home	nursing home	
foster or boarding	home	guardian's home	hospital or medical facility	
relatives home (lis	st name and a	ddress):		
other.				
f the ward resides in	n a facility, the	name and title of the admini	strator or person in charge is:	
The ward has reside	ed in the prese	nt residence since		
f the ward has move	ed within the la	ast year, state the reason for	the move:	
Your ward is in a 🗆	locked unlo	cked setting.		
s the ward restraine	ed or has the n	eed for restraints been prese	ented within the past year?	no
f yes, explain:				

FRANKLIN COUNTY FORM 17.7A - GUARDIAN'S ANNUAL REPORT (PAGE 1)

	CASE NO.
Has your ward chang	ged to a more or less restrictive environment in the past year?
no change	more restrictive less restrictive
is the ward currently	in the least restrictive environment for the ward's needs?
It is my opinion that t	the ward's present care is: adequate inadequate
lf inadequate, explair	r
Do you have recomn	nendations concerning the ward's welfare?
If yes, explain:	
Do you contact your	ward in other ways? telephone mail social worker other tify:
The date of your last	visit was:
Are you kept informed	d of your ward's physical and mental condition by medical and/or human services staff? 🔲 yes 🔲 no
If yes, please specify	г.
During the past year,	I believe the ward's physical condition has: remained the same improved deteriorated
if there has been a c	hange in the ward's physical condition, describe the change:
Name of ward's phys	ician: .
Physicians address:	
Date of ward's last vi	isit to physician:
Date of ward a last vi	on to prijotomi.

	CASE NO.
List any public or private professionals actively involved with	your ward within the past year:
Check one of the following:	
I believe that the continuation of the guardianship is	necessary.
☐ I do not believe that the continuation of the guardian	ship is necessary for the following reasons:
Within the past year, have you developed any disabilities whi	ich hinder your duties as guardian? yes no
If yes, explain:	
Do you currently serve as the guardian to ten or more wards	s? ☐ yes ☐ no
Are you aware of any circumstances that may disqualify you f	from serving as a guardian for this ward? yes no
Are you able to continue to serve as guardian? yes	no
My attorney is as follows:	
Attorney Name	
Autoritey Name	
Address	
City, State, Zip Code	
City, State, Zip Code	
Telephone Number (include area code)	
Attached is a statement by a physician, clinical psychologist, lict that has evaluated or examined the ward within three (3) m continuing the guardianship unless the court previously dispe	onths prior to the date of this report regarding the need for
Date	Guardian's Signature
	Typed or Printed Name
	Typed or innited Name
	Address
	City, State, Zip Code
	Home Telephone Number (include area code)
	Business Telephone Number (include area code)



Reset Form



Statement of Expert Evaluation

PC-G-17.1A (Rev. 5-2019)

PROBATE COURT OF FRANKLIN COUNTY, OHIO JEFFREY D. MACKEY, JUDGE

THE MATTER OF
HE GUARDIANSHIP OF
ASE NO
STATEMENT OF EXPERT EVALUATION [Sup.R. 66 & R.C. 2111.49]
ncompetent" means any person who is so mentally impaired, as a result of a mental or physical illness or disability, a result of intellectual disability, or as a result of chronic substance abuse, that the person is incapable of taking oper care of the person's self or property or fails to provide for the person's family or other persons for whom e person is charged by law to provide; or any person confined to a correctional institution within this state. R.C. 11.01(D).
his Statement of Expert Evaluation does not declare the Prospective Ward competent or incompetent, but is indence to be considered by the Court.
ne fee for completing this Statement of Expert Evaluation WILL NOT be paid by the Probate Court. Each evaluator louid secure payment from the Applicant/Guardian.
This Statement of Expert Evaluation is filed with or attached to:
□ A. Guardianship Application: Statement of Expert Evaluation must be completed by: □ Licensed Physician □ Licensed Clinical Psychologist prior to the filling of the application.
□ B. Guardian's Report: Statement of Expert Evaluation completed by: □ Licensed Physician □ Licensed Clinical Psychologist □ Licensed Independent Social Worker □ Licensed Professional Clinical Counselor or □ Developmental Disability Team. The evaluation or examination shall be completed within three months prior of the date of the Report, R.C. 2111.49.
□ C. Application for Emergency Guardianship: Statement of Expert Evaluation completed by: □ Licensed Physician - must complete Statement of Expert Evaluation and Supplemental Form 17.18, with specificity indicating the emergency, and why immediate action is required to prevent significant injury to the person. The supplemental form must be signed, dated, and attached as part of this Statement of Expert Evaluation.
Statement completed by: [please type or print legibly]
Name & Title:
Business Address:
Business Telephone Number:
Date(s) of evaluation:
Place(s) of evaluation:
Amount of time spent on evaluation:
Length of time Prospective Ward has been your patient:
09 FRANKLIN COUNTY FORM G.17 1A . STATEMENT OF EXPERT EVALUATION

OACE NO.
Is the Prospective Ward presently taking medication?
Are there any signs of physical and/or mental impairments caused by the medications themselves:
Is the Prospective Ward mentally impaired?
☐ Intellectual Disability/Developmental Disability: ☐ Profound ☐ Severe ☐ Moderate ☐ Mild
☐ Mental Illness: [type and severity]
Substance Abuse: [description]
Dementia: [description]
Other: [description]
Please provide additional comments and test scores if available: [continue comments on pages 4]
During the examination did you notice an impairment of the Prospective Ward's;
a, Orientation
c. Motor Behavior
d. Thought Process
f. Memory Yes No Unknown
g. Concentration and Comprehension
Please describe any impairments or history identified in questions 5 and 6 above: [continue comments on page 4]



Statement of Expert Evaluation

	CASE NO
8. Is the Prospective Ward physically impaired? Yes	□ No If yes, description:
	ictive Ward which should be considered in evaluating the
10. Are there any indications of abuse, neglect or exploits	ation? Yes No If yes, explain:
,	managing the Prospective Ward's activities of daily living o
12. Do you believe the Prospective Ward is capable of	managing the Prospective Ward's finances and property?
13. Prognosis: A. Is the condition stabilized?	
14. In my opinion a guardianship should be:	Established/Continued Denied/Terminated
I certify that I have evaluated the Prospective Ward on	, 20
The state of the s	
Date	Signature of Evaluator
License #	Printed Name
	PORT ADDENDUM
[Not to be used wi	th initial Application] adical or psychological certainty, that the mental capacity Signature - Licensed Physician/Clinical Psychologist

ADDITIONAL COMMENTS	

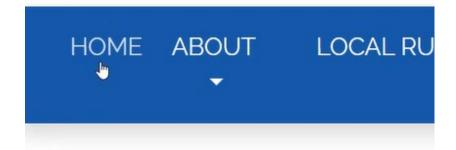
CASE NO. ___



Return To The Probate Website

 Return to the Probate Website and click the Home icon

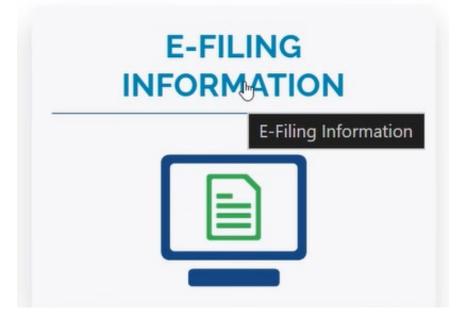






• Select the E-Filing Information icon







Select Franklin County E-Filing System

FRANKLIN COUNTY E-FILING SYSTEM

- This will take you to our E-Flex page
- You will either log in or create a new account.



New Users

If you have not signed in before please request a user account.

Request Account





Electronic Filing

Welcome to eFiling

Please Log In

Username

Password

Notice

☐ I have read and agree to the Notice of Redaction Responsibility.

Log In

Forgot Your Password?

Forgot Your User Name?

New Users

If you have not signed in before, please request a user account.

Request Account



We encourage you to stay informed about our eFiling updates and explore the new interface. For the latest information, visit our resources page. For probate specific information, please visit their website.

Effective October 28, 2022, all pdf file uploads must be formatted no larger than legal size (8.5" X 14") and must be portrait oriented. Uploads not adhering to this format will not be accepted.

To ensure that your organization continues to receive electronic email notifications about filings, please work with your IT department to prevent those email notifications from being flagged as spam or junk.

System maintenance occurs nightly beginning at midnight and may last up to one hour. Access to submit electronic filings may not be available



Creating an Account

- You will read the notice
- Select the appropriate statement
- Click Submit

Important notice of redaction responsibility: Rules 44 and 45 of the Rules of Superintendence for the Courts of Ohio provide that parties and their attorneys should not include, or must redact where inclusion is necessary, certain personal indentifiers in order to protect personal privacy. Rule 44 (H) defines personal identifiers to mean "social security numbers, except for the last four digits; financial account numbers, including but not limited to debit card, charge card, and credit card numbers; employer and employee identification numbers; and a juvenile's name in an abuse, neglect, or dependency case, except for the juvenile's initials or a generic abbreviation such as 'CV' for 'child victim.'" Personal identifiers should be omitted or redacted from all case documents submitted to the Court or filed with the Clerk, unless otherwise ordered by the Court.

- I have read the applicable Administrative Order(s) and/or Local Rules, https://clerk.franklincountyohio.gov/efiling/efilingResources, that govern e-Filing and I accept the terms of the user agreement.
- O I do not accept the terms of the user agreement



ng Manual terms of use privacy policy payment policy support about Tybera Development Group, Inc.



Creating an Account

- Select your User Role
 - If you are an Applicant Non-Attorney, you will select Pro Se

USER ROLES

Select your user role:	
O Agency / Facility	
O Agency / Facility ADMINISTRATION	
Attorney	
O Attorney-CSEA	
O Court Reporter External	
O Financial Institution	
O Forensic	
O Government Agency	
O Media	
O Parenting Coordinator/Custody Evaluator	
O Pro Hac Vice	
O Pro Se	
O Probate ADAMH Bd Review	
O Probate Doctor	
O Probate Paralegal Proxy	
O Probate Prescreener	
O Process Server	
O Proxy Filer	

Complete mandatory fields



User Agreement ⇒ Select User Role ⇒ Request a User Account

Request a User Account

Organization Name:	Pro Se
User Name:	*
Password:	*
Confirm Password:	*
Title:	
First Name:	*
Middle Name:	
Last Name:	*
Suffix Name:	
No Phone Available	



Logging In To eFile

Your account will be created

User Account Requested

Your request to be registered as a user of

Jane Doe

User Name: JaneDoeTest

Bar Number:

Bar State:

Phone: 614-111-2222

Fax:

Email: 123@gmail.com

Address: 123 High St

Columbus, OH 43215

US

You will log in

Welcome to eFiling

Please Log In
Username
JaneDoeTest
Password
Notice

■ I have read and agree to the Notice of Redaction Responsibility.

Log

Forgot Your Password?



Select Existing Case







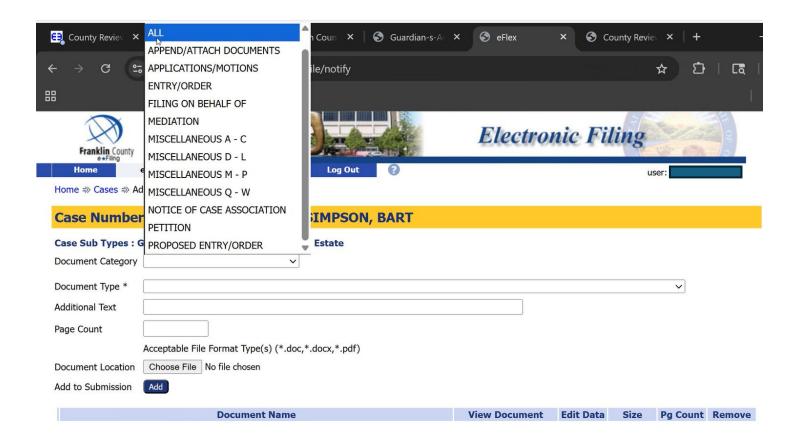
- Enter your Case Number
- Then select eFile



There are no cases on record for you.

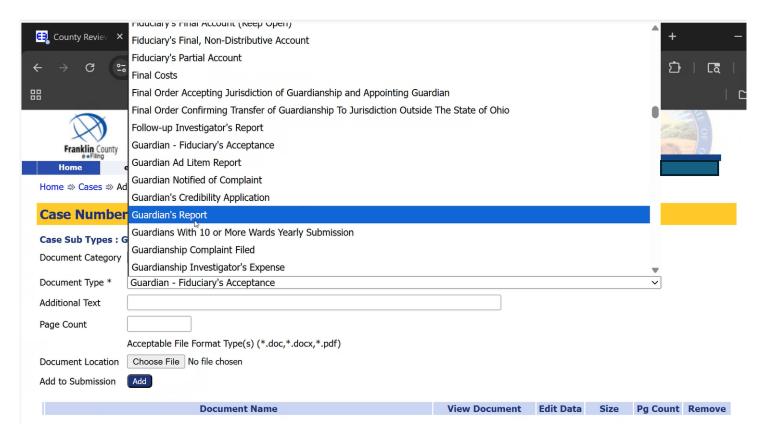


• In the Document Category you will select All



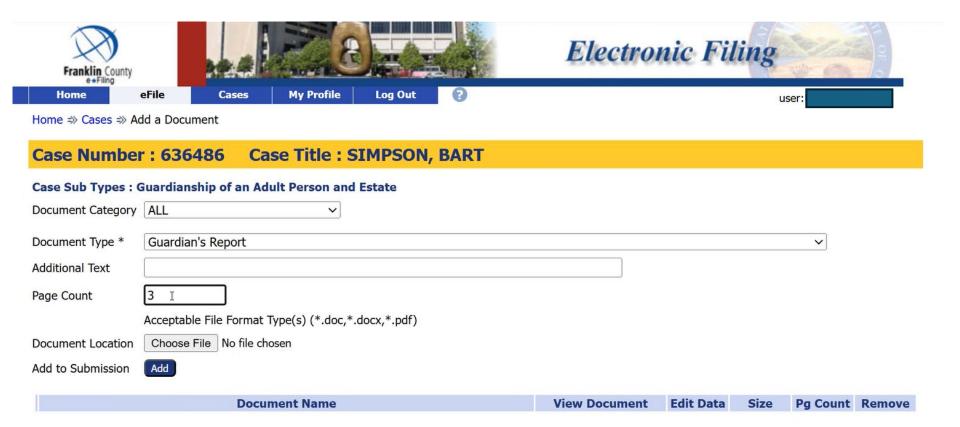


In the Document Type you will select Guardian's Report





Put in the correct number of pages

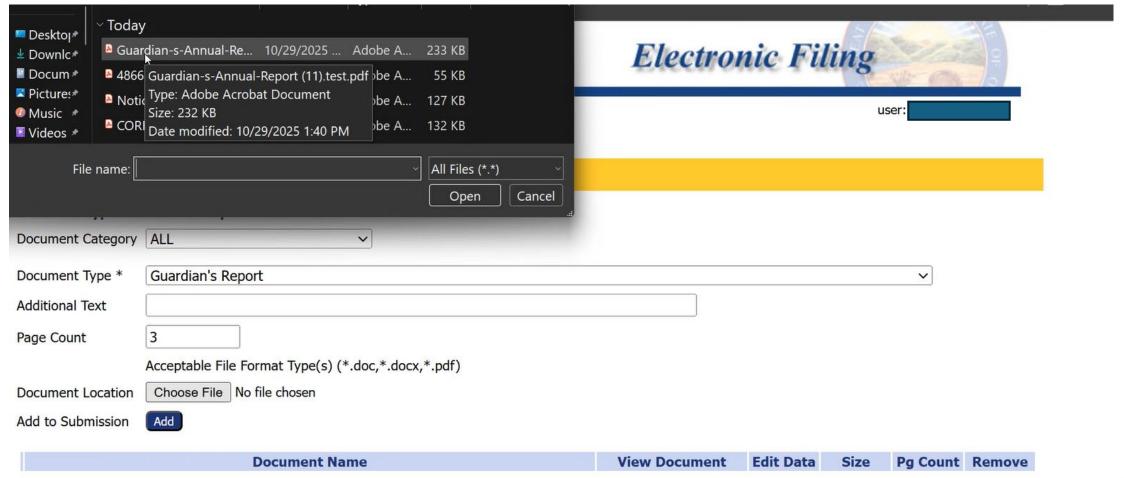




Choose the File

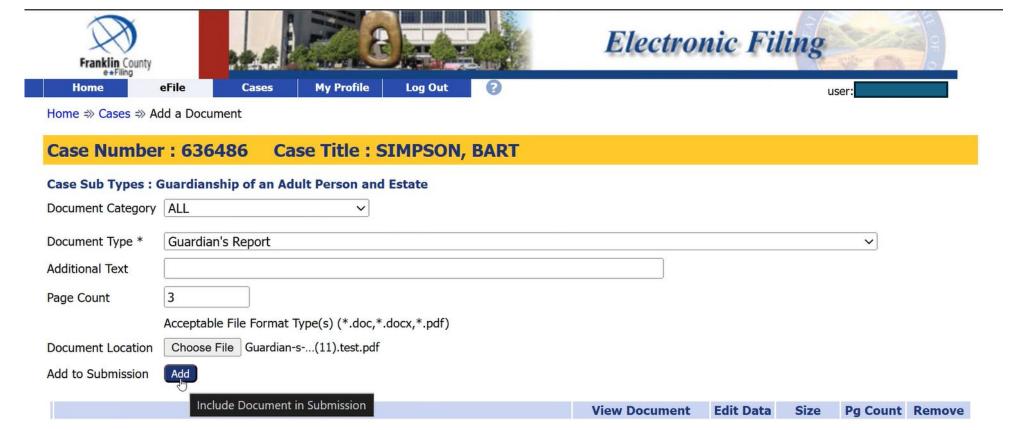








Add the File

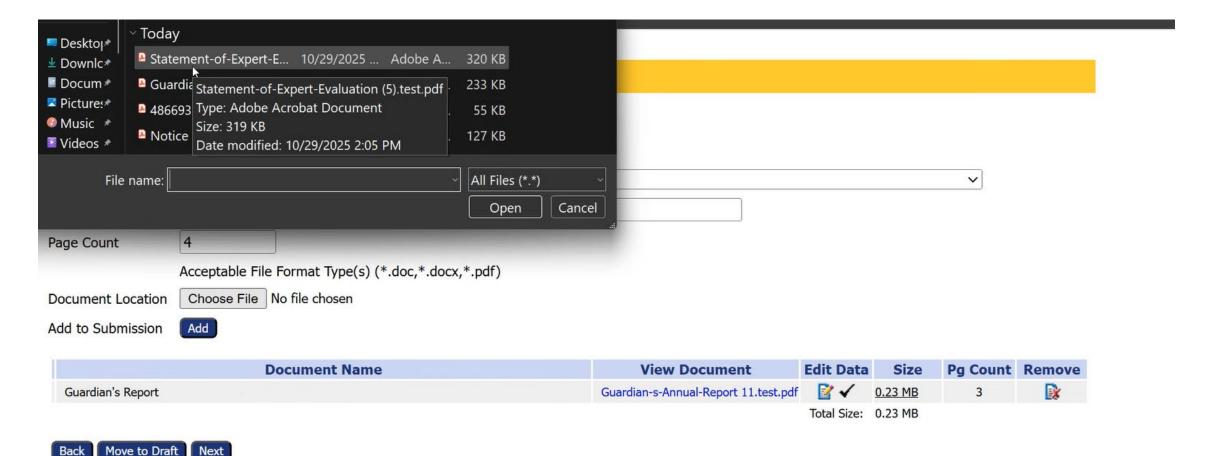




You will
 also need
 to upload a
 current
 copy of the
 Statement
 of Expert
 Evaluation









Caco Number : 626496 Caco Title : CTMDCON DADT

 Once both files are added you will select next

Case Sub Types : Guardianship of an Adult Person and Estate Document Category ALL					
Document Type *				~	
Additional Text					
Page Count					
Acceptable File Format Type(s) (*.doc,*.docx,*.pdf)					
Document Location Choose File No file chosen					
Add to Submission Add					
Document Name	View Document	Edit Data	Size	Pg Count	Remove
Guardian's Report	View Document Guardian-s-Annual-Report 11.test.pdf	Edit Data	Size 0.23 MB	Pg Count	Remove
		≧ ✓	0.23 MB 0.32 MB		
Guardian's Report Statement of Expert Evaluation - Follow Up	Guardian-s-Annual-Report 11.test.pdf	≧ ✓	0.23 MB 0.32 MB	3	
Guardian's Report	Guardian-s-Annual-Report 11.test.pdf	≧ ✓	0.23 MB 0.32 MB	3	



- The Guardian's name should appear as the Fiduciary
- You will click the box under Select
- Then click Next





Documents

If your Ward is Indigent you will select Indigent

Case Sub Types: Guardianship	of an Adult Person and Estate
	The state of the s
Client #	
Estimated Fees: \$10.00	
Special Waiver	
Government Agency	
 Indigent Guardianship 	₽.
O Pay by Credit Card	
Document(s) to be Submitted:	Add/Remove Documents
Document Name	View Document
Guardian's Report	Guardian-s-Annual-Report 11.test.pdf
	Guardian-s-Annual-Report 11.test.pdf
	Guardian-s-Annual-Report 11.test.pdf v Up Statement-of-Expert-Evaluation 5.test.pdf

If you are not Indigent you will select to pay by Credit Card

Case Sub Types: Guardianship of	an Adult Person and Estate
Client #	
Estimated Fees: \$10.00	
O Special Waiver	
O Government Agency	
Indigent Guardianship	
Pay by Credit Card Document(s) to be Submitted: Document Name	Add/Remove Documents View Document
Guardian's Report	Guardian-s-Annual-Report 11.test.pdf
Statement of Expert Evaluation - Follow Up	
Special Filing Instructions for the Clerk	κ:



Submit the Filing

Document(s) to be Submitted:

Add/Remove Documents

Document Name	View Document		
Guardian's Report	Guardian-s-Annual-Report 11.test.pdf		
Statement of Expert Evaluation - Follow Un	Statement-of-Expert-Evaluation 5.test.pdf		

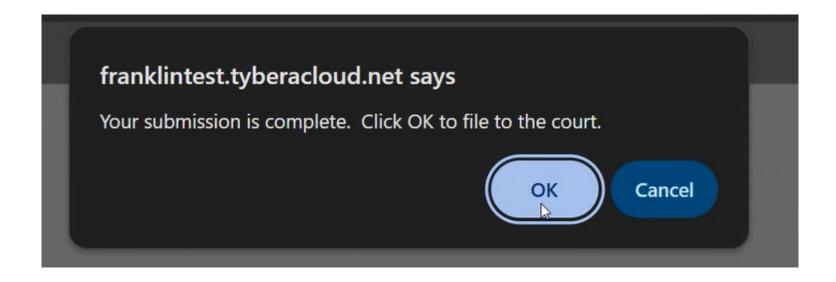
Special Filing Instructions for the Clerk:



Submit the Filing



You will see this when your Submission is Complete





Confirmation Page



Home ⇒ Cases ⇒ Add a Document ⇒ Review and Submit Filing ⇒ Submission Confirmation

Your Filing has been submitted

Case Type: Guardianship of an Adult Person and Estate - Guardian's Report

Note: This filing is now being processed and added to the Clerk of Court document repository. Once the eFiling System has stored the documents associated with your filing, a receipt will be issued to you. You may view the status of this filing, and access your receipt for 60 days, after which it will be purged from this system. The documents will be retained and available long term through the Clerk of Court.

Filing Status



Your Filings

My Filings My Filings **Filings Report Criteria:** View Filings Between: 10/29/2025 AND 10/29/2025 Status: All Court Case #: Client #: Filing ID: Clear Search My Filings Between 10/29/2025 and Today Delete Filings per page: Filing ID Client # **Case Title** Court Case # **▼** Date Submitted **Document Type Court Division** Status **±** 10507 SIMPSON, BART 636486 10-29-2025 02:13:38 PM Guardian's Report **Awaiting Approval Number of Filings: 1**



Thank You

 Guardianship Clerks will reach out to you if there are any issues or messages associated with your filing

• If you have questions please feel free to call or email

373 South High Street, 22nd Floor probate@franklincountyohio.gov 615-525-3894 614-525-3841

