

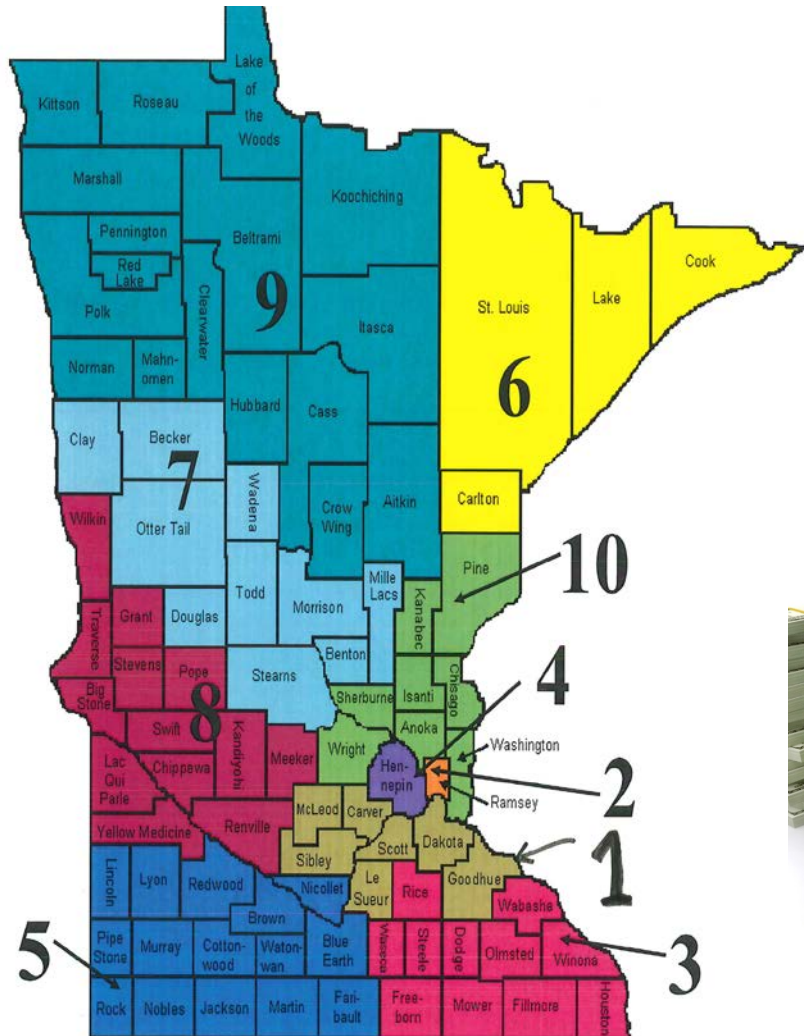
# Minnesota's Online System for Conservators: MyMNConservator

March 2017



MINNESOTA  
JUDICIAL BRANCH

# Minnesota 2016



5408 conservators

\$904,093,046.07



MINNESOTA  
JUDICIAL BRANCH

# Progress to Increased Oversight



## Protected Person(s)

## Notifications

## Reports


*Filter*

+ Add Case

## Conservator(s)

Cate Conservator

Conservator [Edit »](#)

Protected Person(s)	Current Report	Case Number	Anniv Date	Assigned To
<a href="#">Protected, Patty</a>	<a href="#">Inventory Report (New)</a>	02-PR-15-272	07/01/2015	You 

Showing 1 to 1 of 1 Records

[First](#) [Previous](#) [1](#) [Next](#) [Last](#)



## SAMPLE PERSON INVENTORY REPORT

CASE NUMBER : 14-PR-14-5

[Previous CAMPER Data](#)

44 Days To File No Updates

Financial Accounts

Personal Property

Real Estate

Review & Submit

**Files:** There are currently no files uploaded.

Upload a File

Help is Off

[Turn On](#)

## All Personal Property

Add Property

Export Property

Account Types

Description

Type

Value

All Personal Property

Valuables (0)

Vehicles (0)

Others (0)

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


Financial Accounts

Personal Property

Real Estate

Review & Submit

Does Patty Protected have individual jewelry items, precious metals or coin collections, collections with a total value greater than \$500, antiques, furs, art, individual furniture and household goods that have a total value greater than \$500? Does Patty Protected have a vehicle, boat, recreation vehicle, RV, or Motorhome?


 Help is On

[Turn Off](#)

Yes:

No:

 Watch Tutorial

 Proceed To Real Estate

**Files:** *There are currently no files uploaded.*

Upload a File

All Personal Property

Add Property

Export Property

# Annual Account Income and Expense

Financial Accounts

Income & Expenses


Personal Property

Real Estate


Review & Submit

**Files:** *There are currently no files uploaded.*

Upload a File

 Help is Off

[Turn On](#)

 .CSV Upload

Add Transaction

Export Transaction

[.CSV Help](#)

[.CSV Template](#)

**MN Bank - 1 Savings**

[\(Add Another Account?\)](#)

[First](#) [Previous](#) [Next](#) [Last](#) of 0 pages

Date	Payment Type	Description
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MN Bank - 1  
Savings  
\$5,000.00

[First](#) [Previous](#) [Next](#) [Last](#) of 0 pages

Page Size 10 [25](#) [50](#)

Date\*

08/26/2015

Description\*

Payable to

Amount\*

\$ 0



☐ Income

☒ Expense

☐ Transfer

Payment Type\*

Check

Check Number\*



Category\*



Account\*

MN Bank - 1 (Savings) \$5,000.00



Save

Save and Add Another or Cancel

\* = Required

[← Back To My Dashboard](#)

## Income & Expenses Detailed View

[Print](#)

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

Showing 1 to 7 of 7 Records

[First](#) [Previous](#) [1](#) [Next](#) [Last](#)



# Benefits: Conservator

A scroll with a list of benefits for the Conservator tool. The scroll is unrolled and shows a list of five items: 'User friendly', 'Tool to help manage assets', 'Easy to file', 'Help Text, Videos and help line', and 'Reminders'. The scroll is held by two dark wooden rollers.

User friendly

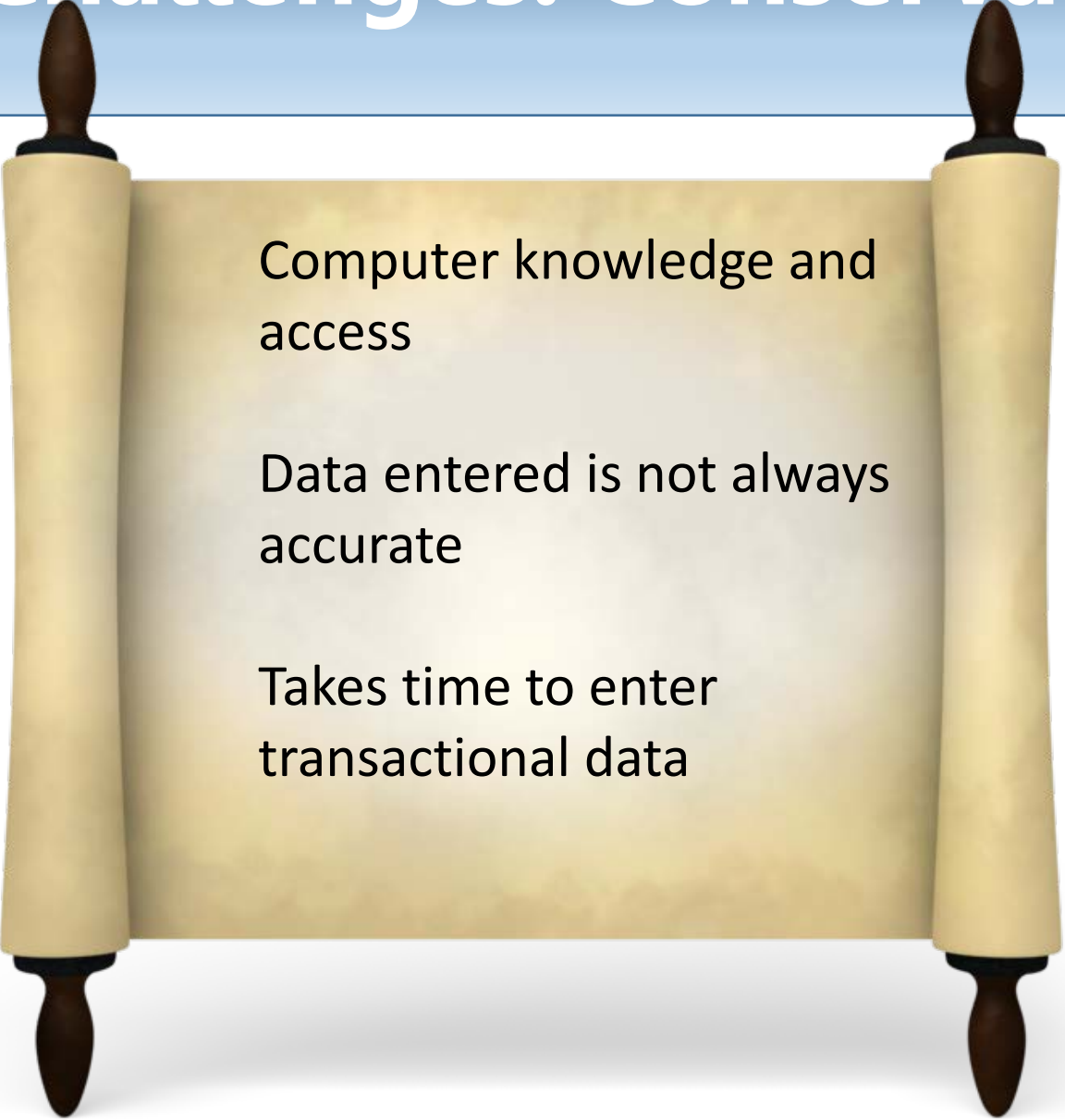
Tool to help manage assets

Easy to file

Help Text, Videos and help  
line

Reminders

# Challenges: Conservator

A graphic of a scroll with four dark wooden rollers. The scroll is unrolled in the center, showing three lines of text. The background is a light blue gradient at the top and white below.

Computer knowledge and  
access

Data entered is not always  
accurate

Takes time to enter  
transactional data

# Benefits: Court

Oversight tool:

audit


red flags

risk indicators

Integration with Case  
management system

Consistent reports  
statewide

# Challenges: Court

A large, unrolled scroll with a light beige, parchment-like texture. It is held by four dark brown, turned wooden pins at the corners. The scroll is centered on the slide, and the text is written in a black, sans-serif font.

Quality of accounts filed

Managing the MMC system

Education

# Audit View with Flags



MyMNConservator

Log Off

MY DASHBOARD

Hi Sample Auditor

[\(UPDATE LOGIN\)](#)

[REPORTS](#)

Audit Status

Users

Court

Auditor

Filter

Export

Unassigned

In Progress

View Protected Person Referral Case Number Submitted Assigned To Flags

April 30, 2014	Morgan Stanley	(\$25,000.00)	Transfer To	!
March 31, 2014	Morgan Stanley	View	Investment - Interest	!
March 31, 2014	Morgan Stanley	\$42.95	Asset Appreciation	!
December 31, 2013	Morgan Stanley	\$0.40	Investment - Interest	!

3 flags:

Transfers  
Between  
Accounts  
Large Expense  
New Substantial  
Expense

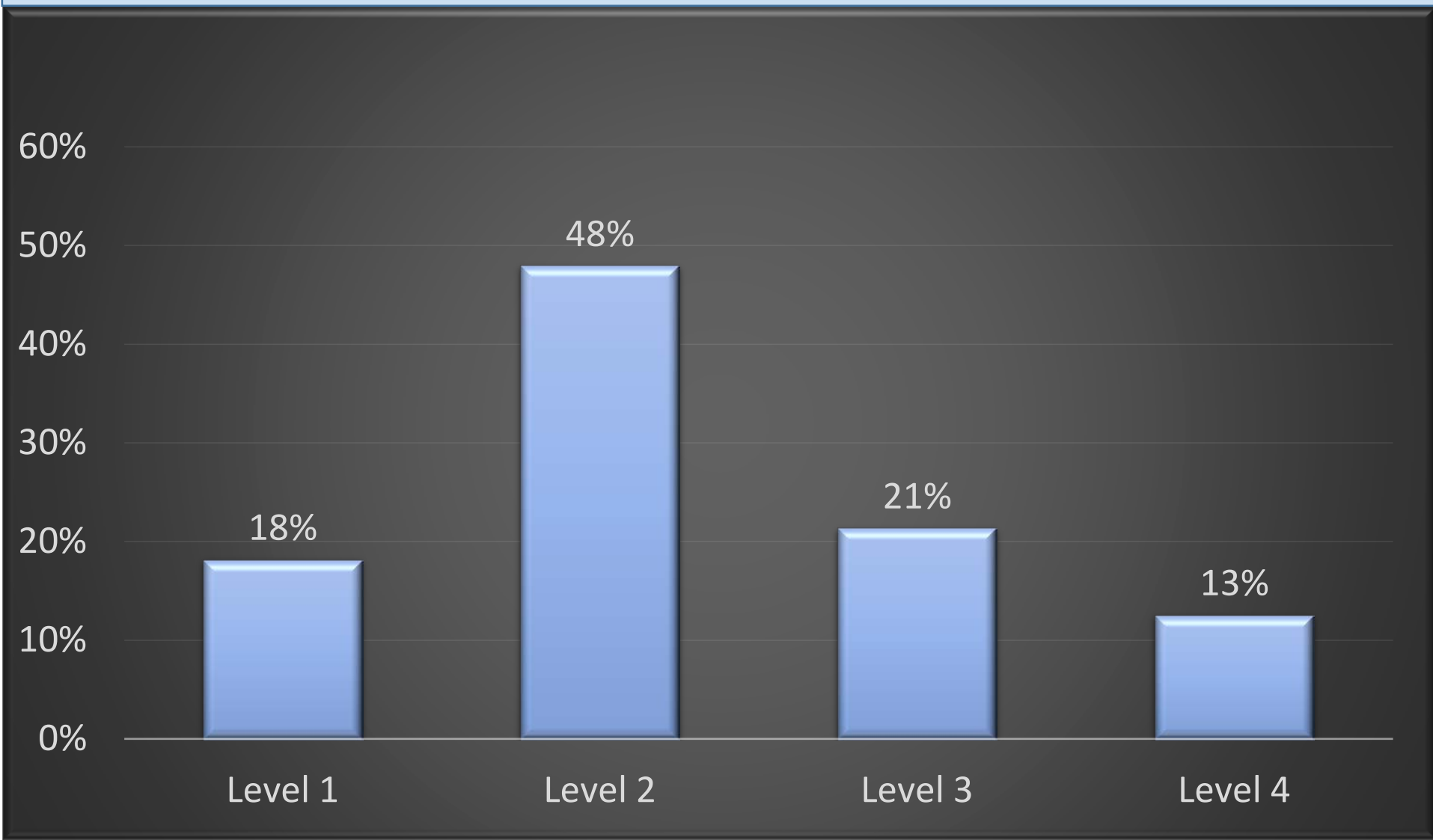
52

77

6

124

# Audit Results 2016



# Risk Indicators



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