# **Income and Expense Tracker**

for Alaska Guardians and Conservators

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**Note**: The orange circle will show you where to click.

## **Registering Your New Account**

1 Go to: <u>ak-courts.info/giet</u>

2 Select **Register as a new user**.



## Income & Expense Tracker

### for Alaska Guardians & Conservators

Welcome. This tool helps Alaska's court-appointed guardians and conservators track income and expenses related to their gua answer the questions below to make inputs or get a report on the income and expenses. More about this tool.

Selectione: O Register as a new user O Lalready have an account



**3** Type your email in the **Your email** box.

## for Alaska Guardians & Conservators

Welcome. This tool helps Alaska's court-appointed guardians and conservators track income and expenses rela answer the questions below to make inputs or get a report on the income and expenses. More about this tool.

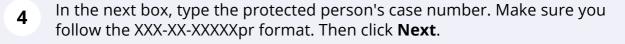
#### Select one:

Next >

Register as a new user
 I already have an account

Please enter your email address:

	iour ema
Ple	ase enter your case number:
	XX-XX-XXXXXpr



Select one:		
<ul> <li>Register as a new user</li> </ul>		
O I already have an account		
Please enter your email address:		
aobrien@akcourts.;		
Please enter your case number:		
KXX XXXpr		
Next >		

You will be sent a confirmation email. You will need to go to your email and click on the link in the confirmation email before you can continue.

6 Once you click the link in your email, you will be brought to the registration page. Type your email in the box next to **Email**.

Registration         * Email:       Image: Control accounts.gov         * First name :       Image: Control accounts.gov         Middle name :       Image: Control accounts.gov         * Last name :       Image: Control accounts.gov         Organization :       Image: Control accounts.gov	

**7** Type your first and last name in the correct boxes.

	* Email:       aobrien@akcourts.gov         * First name:	
No. of Street of Street of Street	i New password Ø	

8 The **Organization** box does not have a red star, but you <u>must fill it out</u>. You can type "John's guardian" or "Dad's conservator" or just "family member." It does not matter what you type, but you <u>must</u> fill it in.

5 M				and the second s
- all	* Email:	aobrien@akcourts.gov		
heat a heat at a se	* First name:	Guardian		and the
STATE THAT	Middle name:			
	* Last name :	Guardian		all and the second second
	Organization:			
and the second second second	i New passwo	ord	ø	
LEAK MERINA PARTICIPALITY	i Re-enter nev	w password	Ø	
		Register		

9 Next, choose your password.

The password must contain at least one upper case letter and one special character. The court system will not have access to your password. If you lose it, you need to reset your password in the system. If you cannot reset your password, email <u>lwawrzonek@akcourts.gov</u>.

Lautenham stora.	* First name:	Guardian		and b
	Middle name:			and the second second
	* Last name:	Guardian		All and a second
	Organization:	Family Member		
States States and the	i New pas		ø	
A Automatical real	i Re-enter nev	v password	Ø	
		Register		

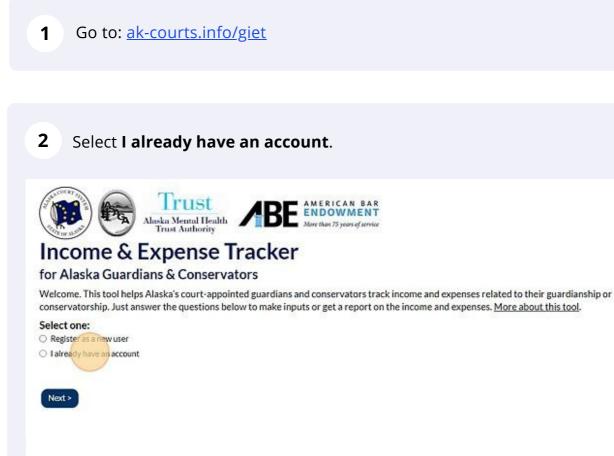
## Re-enter your password.

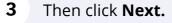
district	Middle name:	
	* Last name: Guardian	
	Organization: Family Member	
and the second	i Ø	
M AUALMIN IN THE CA	i Re-enter new password	
A CONTRACTOR OF THE OWNER	Register	
a Logic Inc. All Rights Reserved. Terms & Conditi	ions Privacy Policies	

## 11 Click Register.

		* Last name: Guardian		and - and
	(	Organization: Family Member		
and the second	i	•••••	ø	
W ALLER WITH THE	i	••••••	ø	
		Register		
Logic Inc. All Rights Reserved. Terms & Condi	tions	Privacy Policies		

# Logging In





### for Alaska Guardians & Conservators

Welcome. This tool helps Alaska's court-appointed guardians and conservators track income and expenses rela conservatorship. Just answer the questions below to make inputs or get a report on the income and expenses. I

#### Select one:

O Register as a new user

I already have an account

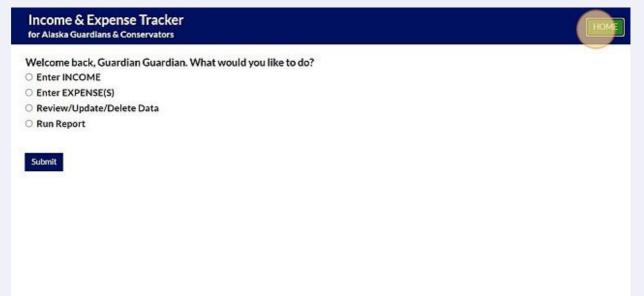


### **4** Type in your email and password into the correct fields and click **Log in**.

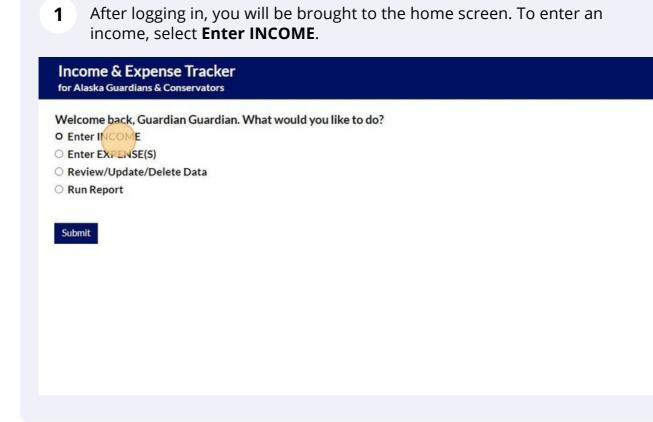
A all	Education and	
which the state	🔤 aobrien@akcourts.gov	
	Log in Forgot your password?	

You will brought to the home screen. When you are in the program, you can always click the **HOME** button in the upper right-hand corner of the screen to return to the home screen.

5



# **Entering Income**



### 2 Click Submit.

#### for Alaska Guardians & Conservators

Welcome back, Guardian Guardian. What would you like to do?

- Enter INCOME
- O Enter EXPENSE(S)
- O Review/Update/Delete Data
- O Run Report



**3** Type in how many income items you want to enter. You can always add more later. Then click **Next**.

Approximately, HOW MAR	NY INCOME ITEMS do you want to sub	mit now?
<b>4</b> Type the income	amount in the box under <b>Am</b>	ount.
4 Type the income Enter your INCOME ITE Click + or x to add or remove	MS below:	ount.
Enter your INCOME ITE	MS below: e an income item.	ount.
Enter your INCOME ITE Click + or x to add or remove	MS below: e an income item.	Dunt.
Enter your INCOME ITE Click + or x to add or remove Income Updates - Use	<b>MS below:</b> e an income item. r one	
Enter your INCOME ITE Click + or x to add or remove Income Updates - Use Amount:	MS below: e an income item. r one Date:	Category:

5 Then enter the date of the income. The program automatically chooses the date you are entering the income. If you want to choose a different date, you can type in the correct date or click the calendar icon next to the **Date** box.

#### ter your INCOME ITEMS below:

6

:k + or x to add or remove an income item.

ount:	Date:	Category:
1000	Dec 21, 2022	Social Security: SSA/SSDI 👻
Another Income Item		

If using the calendar icon, select the date from the calendar pop-up. Be sure the date you choose is the correct month, date, and year.

Amount:		Date:							Category:
\$ 1000		Dec	21,2	022		]			Social Security: SSA/SSDI
		0		Dec	<b>√</b> 20	22 ~		0	
		Su	Мо	Tu	We	Th	Fr	Sa	
dd Another Income	Item					1	2	3	
		4	5	6	7	8	9	10	
	ing income informat	11	12	13	14	15	16	17	
	ing income informat	18	9	20	21	22	23	24	
		25	26	27	28	29	30	31	

## 7 Click the down arrow next to the **Category** box.

v: e item.		
Date: Dec 21, 2022	Category: SELECT A CAT	<u>Re</u>
ition		

Category: 2022 SELECT A CATEGORY: SELECT A CATEGORY: Social Security: SSA/SSDI Social Security: SSI Adult Public Assistance Veteran Financial Benefits Senior Care Benefit	8 Scroll to drop dov	from the
SELECT A CATEGORY: SELECT A CATEGORY: Social Security: SSA/SSDI Social Security: SSI Adult Public Assistance Veteran Financial Benefits		Remove
SELECT A CATEGORY: Social Security: SSA/SSDI Social Security: SSI Adult Public Assistance Veteran Financial Benefits	, 2022	
Social Security: SSI Adult Public Assistance Veteran Financial Benefits		
Veteran Financial Benefits		
Senior Care Benefit		
Permanent Fund Dividend		

If you select **Other**, make sure to write the income details in the **Other-details** box.

er  Other - details:	

Amoun	t:	Date:	Category:
\$	1000	Dec 21, 2022	Social Security: SSA/SSI
	1000		000000000000000000000000000000000000000
1	ther Income Item		

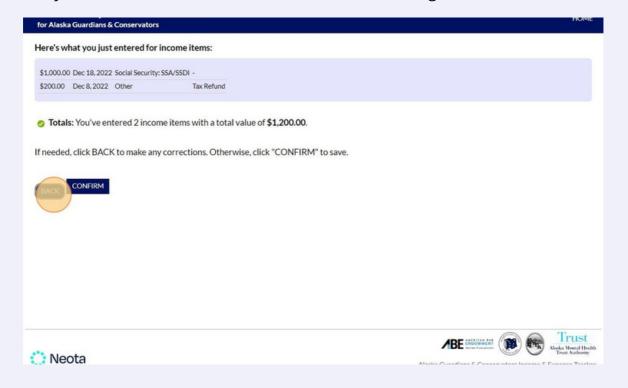
**11** If you've accidentally added too many income item boxes, you can remove them by clicking **Remove** in the top right-hand corner of the box.

		<u>Remove</u>
	Category:	
2022	Social Security: SSA/SSDI	
	Category:	Remove
2022	SELECT A CATEGORY:	
2022		

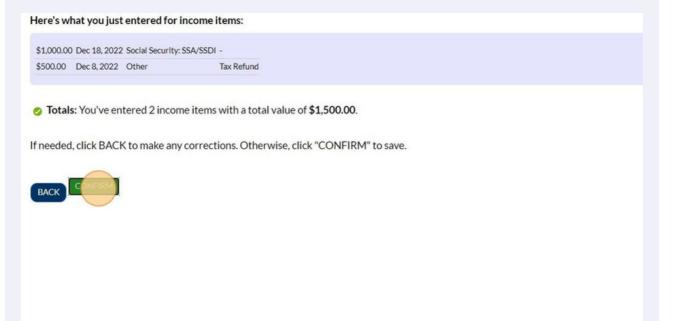
12 When you are finished entering incomes, click **I'm DONE submitting income information** at the bottom of the page.

Amount:	Date:	Category:
\$ 200	Dec 8, 2022	Other
Add Another Income Item		
'm DONE submitting incor	ne information	
Neota		
Neota		
Neota		

**13** You will be brought to a review screen. If you see a mistake, click **BACK** and you can correct the mistake in the income entering screen.



**14** If everything looks correct, click **CONFIRM**. You must click **CONFIRM** to save. You will be brought back to the home screen.



## **Entering Expenses**



After logging in, you will be brought to the home screen. To enter an income, select **Enter EXPENSE(S)** and then click **Submit**.

### Income & Expense Tracker for Alaska Guardians & Conservators

Welcome back, Guardian Guardian. What would you like to do?

- O Enter INCOME
- O Enter EXPENSE(\$)
- O Review/Update/Delete Data
- O Run Report



**2** Type in how many how many expenses you want to enter. You can always add more later. Then click **Next**.

### Income & Expense Tracker for Alaska Guardians & Conservators

Approximately, HOW MANY EXPENSES do you want to submit now?



### **3** Type the expense amount in the box under **Amount**.

Expense Ite	em one			
Amount:	Date:	Category:	Upload document/PDF:	Uploa
\$ 0.00	Dec 21, 2022	SELECT CATEGORY:	Choose File No file chosen	Cho
	am two			
<ul> <li>Expense It</li> </ul>				
Expense It	Date:	Category:	Upload document/PDF:	Uplo

4 Then enter the date of the expense. The program automatically chooses the date you are entering the expense. If you want to choose a different date, you can type in the correct date or click the calendar icon next to the **Date** box and select the date from the calendar pop-up. Be sure the date you choose is the correct month, date, and year.

<ul> <li>Expense Item one</li> </ul>										
Amount:	Date	:					Cate	gory:	Upload document/PDF:	Upload ir
\$ 30d	De	c 21, :	2022				SEL	ECT CATEGORY:	Choose File No file chosen	Choose
	0		Dec	~ 20	22 ~		0			
	Su	Mo	Tu	We	Th	Fr	Sa			
					1	2	3			
<ul> <li>Expense Item two</li> </ul>	4	5	6	7	8	9	10			
	11	12	13	14	15	16	17			
Amount:	18	19	20	21	22	23	24	ory:	Upload document/PDF:	Upload in
Anount.										

Click the down arrow next to the Category box. Scroll to select the correct category of expense from the drop down menu. If you select Other, make sure to write expense details in the Other-details box.

300	Dec 7, 2022	-	SELECT CATEGORY:	Upload document/PDF:		pload image:
			SELECT CATEGORI.	Choose File No file cl	nosen	Choose File No file chose
			SELECT CATEGORY:	Â		
			Nursing / Assisted Livir	ng		
			Room and Board			
Expense Item tv	vo		Rent			
			Mortgage			
			Utilities			
nt:	Date:		Transportation	, t∕PDF:	U	pload image:
0.0C	Dec 21, 2022		SELECT CATEGORY:	Choose File No file cl	nosen [	Choose File No file chose

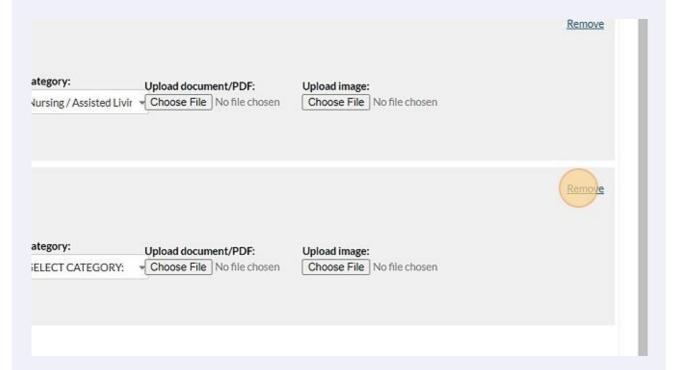
6 If you have a receipt, invoice, or other document that goes with the expense, you can upload the document and save it in the program. If the file is a document or PDF click the left **Choose File** button. If the file is an image or picture, click the right **Choose File** button.

	nove an expen	ise.			
tem on	e				
	Date:		Category:	Upload document/PDF:	Upload mage:
	Dec 7, 2022		Rent	Choose File No file chosen	Choose File No file chosen
tem tw	o				
	Date:		Category:	Upload document/PDF:	Upload image:
	Dec 21, 2022		SELECT CATEGORY:	Choose File No file chosen	Choose File No file chosen
tem tw	o Date:		Category:	Upload document/PDF:	Upload image:

### 7 If you want to add another expense, click **Add Another Expense Item**.

Amount:		Date:	Category:	Upload document/PDF:	ί
\$	0.00	Feb 14, 2023	SELECT CATEGORY:		C
-					
Add Anoth	Expense	Item			
Aug Anota	- expense				
AugAnou	y expense	_			
AugAnou	- copense	_			
		ng expenses			
		ng expenses			

8 If you've accidentally added too many expense item boxes, you can remove them by clicking **Remove** in the top right-hand corner of the box.

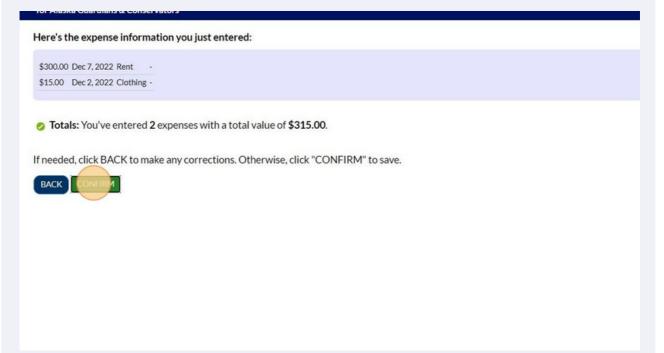


9 W

# When you are finished entering expenses, click **I'm DONE submitting** expenses.

	:	Date:	Category:	Upload docum	ent/PDF:	Upload im
\$	15	Dec 2, 2022	Clothing		No file chosen	Choose F
Add Anot	ther Expense	Item				
DON		~				
m DONI	Esubmittin	expenses				
Neo	ta					Δ
Neo	ta					A

10 You will be brought to a review screen. If you see a mistake, click **BACK** and you can correct the mistake in the expense entering screen. If everything looks correct, click **CONFIRM**. You must click **CONFIRM** to save. You will be brought back to the home screen.



## **Reviewing Incomes and Expenses**



If you want to review the incomes and expenses you have entered, select **Review/Update/Delete Data** and then click **Submit**.

#### Income & Expense Tracker for Alaska Guardians & Conservators

Welcome back, Guardian Guardian. What would you like to do?

- O Enter INCOME
- O Enter EXPENSE(S)
- O Review/Update/Delete Data
- O Run Report



2 Type in the dates you want to start and end the review. Or click the calendar icon and select the date you want to start the review and repeat to choose the date you want the review to end.



### Click **Show Data for the Period**.

	ome & Expense Tracker aska Guardians & Conservators						
Define TIM	E RANGE for	reviewing/updating data:					
Start Date:	Nov 1, 2021						
End Date:	Dec 21, 2022						
Show Data	the Period						

4 You will be brought to an overview screen. To update any of the entries, click **Update Entries**.

	& Expense Tracker			HOME
PERIOD: No	ov 1, 2021 to Dec 21, 2022			
Update as n	eeded:			
INCOME				
Date Dec 8, 2022	Category Other	Other details Tax Refund	Amount \$500.00	
Dec 18, 2022	Social Security: SSA/SSDI		\$1,000.00	
	Total Income for Period:		\$ 1,500.00	
EXPENSE	ES			
Date	Category	Other details	Amount	Documents
December 2, 2022	Clothing	•	\$15.00	
December 7, 2022	Rent		\$300.00	Rent Receipt.pdf
	Total Expenses for Period:		\$ 315.00	
Update Intri BACK	elete Entries			
Neot	а			Alaska Guardians & Conservators Income & Expense True Value Analy 20 Value Analy 20 Value Analy 20

### You can now update the items you have already entered.

Jpdate as nee	ded:			
INCOME				
Date	Category	Other details	Amount	
Dec 8, 2022	Other V	Tax Refund	\$ 500,00	
Dec 18, 2022	Social Security: SSA/SSDI		\$ 1000.00	
	Total Income for Period:		\$ 1,500.00	
EXPENSES				
Date	Category	Other details	Amount	Documents
December 2, 20	Clothing		\$ 15.00	Choose File No file chosen
December 7, 20	Rent *		\$ 300.00	File: Rent Receipt.pdf Choose File No file chosen
	Total Expenses for Period:		\$ 315.00	
				Choose File No file chosen

When you've finished, click **I'm DONE updating** to save your changes. This will take you back to the home screen.

Category	Other details	Amount	
=Other 🗸	Tax Refund	\$ 600.00	
Social Security: SSA/SSDI		\$ 1000.00	
Total Income for Period:		\$ 1,600.00	
Category	Other details	Amount	Documents
Glothing	Sweatshirt	\$ 15.00	Choose File No file chosen
Rent -	April	\$ 300.00	File: Rent Receipt.pdf Choose File No file chosen
Total Expenses for Period:		\$ 315.00	
PDATES I'm DONE updating:			
	Category  Category  Ment  Total Expenses for Period:	Importe     Tax Refund       Importe     Sweatshirt       Importe     April       Importe     April	Image: Constraint of the security: SSA/SSDI       Tax Refund       \$ 600.00         Image: Constraint of the security: SSA/SSDI       \$ 1000.00         Total Income for Period:       \$ 1,600.00         Category       Other details       Amount         Image: Sweatshirt       \$ 15.00         Image: Sweatshirt       \$ 300.00         Image: Total Expenses for Period:       \$ 315.00

5

7

If you want to delete any incomes or expenses, click **Delete Entries**.

INCOME				
Date Dec 8, 2022	Category Other	Other details Tax Refund	Amount \$600.00	
Dec 18, 2022	Social Security: SSA/SSDI		\$1,000.00	
	Total Income for Period:		\$ 1,600.00	
EXPENSE	ES			
Date	Category	Other details	Amount	Documents
December 2, 2022	Clothing	Sweatshirt	\$15.00	
December 7, 2022	Rent	April	\$300.00	Rent Receipt.pdf
Update Entri	Total Expenses for Period		\$315.00	
BACK				
Neot				ABE INDOMENT
	.ci			Alaska Guardians & Conservators Income & Expense Track

## 8 You will be brought to this screen, click the **x** icon. Once you delete an item, it is deleted forever.

#### READ THIS DATA CAREFULLY; THIS DATA CANNOT BE FILTERED FOR A SPECIFIC TIME RANGE.

Click the X next to a row to permanently delete the entry. NOTE: THIS ACTION CANNOT BE UNDONE. If you delete an entry by mistake, you will need to re-create it. PROCEE CAUTION.

INCOME

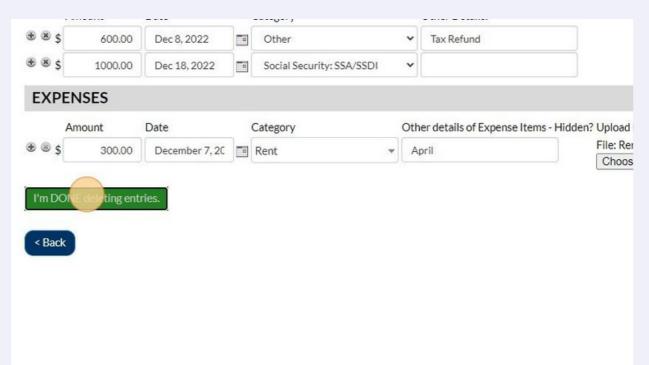
Amount Date Category Other Details:

#### € × 5 600.00 Dec 8, 2022 💿 Other ✓ Tax Refund \* \* s 1000.00 Dec 18, 2022 📑 Social Security: SSA/SSDI ¥ **EXPENSES** Other details of Expense Items - Hidden? Upload Reciept - hidden of Expense Items - Hidden? Date Category Amount Choose File No file chosen 15.00 December 2, 20 🔲 Clothing File: Rent Receipt.pdf .... 300.00 December 7, 20 📰 Rent - April Choose File No file chosen I'm DONE deleting entries. < Back

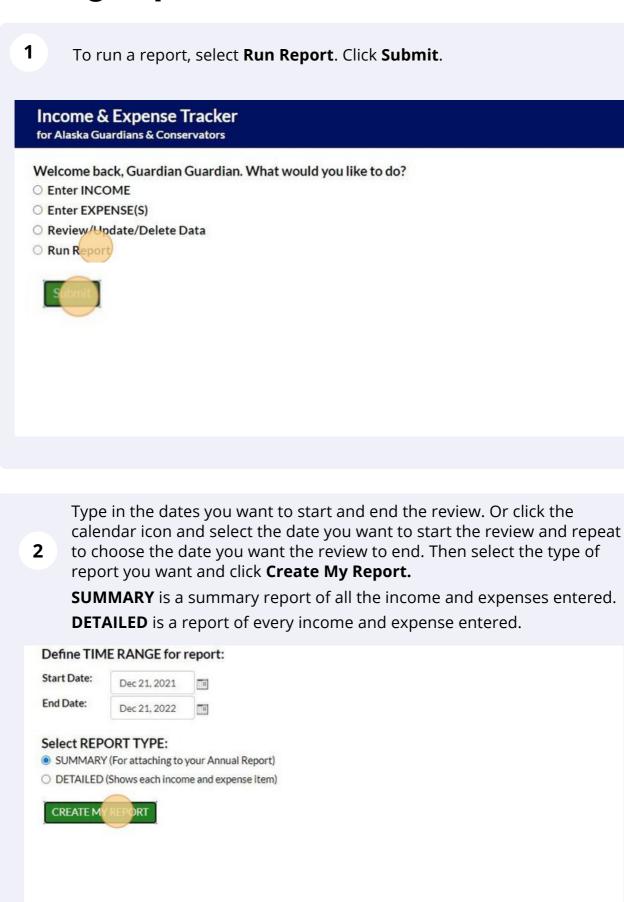
## **9** Confirm you want to delete the item by clicking **OK**.

	Dec 8, 2022	-	Other	~	Tax Refund		
j	Dec 18, 2022		Social Security:	SSA/SSDI 🗸			
	Date		Category	Confirm		×	n? Upload Reciept - hidden of Exp
	December 2, 20		Clothing	Delete this	row?		Choose File No file chosen
	December 7, 20	n	Rent				File: Rent Receipt.pdf Choose File No file chosen
tr	ies.						

# **10** Once you're done, click **I'm DONE deleting entries**. This will take you back to the home screen.



# **Running Reports**



For a **SUMMARY REPORT** the program will summarize the totals for all the income and expenses categories.

To download the report:

3

Click the link after the **To DOWNLOAD your report, click here:** You can download as a PDF or a Word Document.

To download documents and PDFs that you previously uploaded: Click the link after the words **To DOWNLOAD all of your attached documents, click here:.** This will only download as PDF and will <u>not</u> show any uploaded images. Go to the next step to see how to download images.

To email the report to yourself or others: Type in an email address and then click **SEND EMAIL**.

	2	
Auto Insurance	\$-	
<ul> <li>Medical Insurance</li> </ul>	\$-	
Life Insurance	\$-	
Gifts	\$-	
Child / Spousal Support	\$-	
Fees / Costs Pald to Guardian	\$-	
Other	\$50.00	
Grand Total for Period:	\$750.00	
To DOWNLOAD all of your attached documer To have your report EMAILED, enter the email Back SEND EMAIL		



For a **DETAILED REPORT** the program will show each expense and income entered.

To download the report:

Click the link after the **To DOWNLOAD your report, click here:** You can download as a PDF or a Word Document.

To download documents and PDFs that you previously uploaded: Click the link after the words **To DOWNLOAD all of your attached documents, click here:.** This will only download as PDF and will <u>not</u> show any uploaded images. Go to the next step to see how to download images.

To download pictures or images that you previously uploaded: Click the name of the image under the **Images** column and the image will download. You will have to do this for each individual image.

To email the report to yourself or others: Type in an email address and then click **SEND EMAIL**.

			Other details	Amount	
	2022-12-08	Other	Tax Refund	\$600.00	
	2022-12-18	Social Security: SSA/SSDI	-	\$1,000.00	
ihowing 1 to 2 of	f 2 entries				
Total Income	for Period:	\$1,600.00			
EXPENSES	5				
Date	Category	Other details	Amount	Images	Documents
2022-12-07	Rent	April	\$300.00		Rent Receipt.pdf
2023-01-11	Recreation or Enterta	Inment	\$400.00	ELECana	
	Other				

### If you finished with the report, click **HOME**.

Income & Expense Tracker for Alaska Guardians & Conservators

Your report is shown below. To DOWNLOAD your report, use the links below the report. If you want the report EMAILED, enter the email below the report.

#### Alaska Guardian/Conservator Income & Expenses

SUMMARY REPORT for 3AN-45-99999pr

PERIOD: Dec 21, 2021 to Dec 21, 2022

#### INCOME

itegory	Total for Period
<ul> <li>Social Security: SSA/SSDI</li> </ul>	\$1,000.00
Social Security: SSI	\$-
Adult Public Assistance	s-
Veteran Financial Benefits	ş.
Senior Care Benefit	\$-
Permanent Fund Dividend	s-
Native Corporation Dividend	\$-
Wages	s-
Dividend/Interest	\$-
Rental Income	ş.
Pension	ş-
Annuities	<u>s</u> .