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		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Monthly Average	2024 Actual through SEPT.
<b>Case Information</b>															
1	Total Proposed Cases	16	24	11	16	25	20	18	22	28				20	180
	Appointed Cases	11	17	11	11	24	17	13	20	25				17	149
2	Pending Appointment	-	-	-	-	-	-	1	-	-					1
	Not Appointed	5	7	-	5	1	3	4	2	3				3	30
<b>Total Processed Guardianship Cases</b>		<b>847</b>	<b>848</b>	<b>844</b>	<b>853</b>	<b>844</b>	<b>862</b>	<b>876</b>	<b>873</b>	<b>871</b>					<b>837</b>
2	Ongoing Guardianship Person & Estate (P & E) Cases	816	817	812	817	810	825	838	834	835				823	
	Ongoing Guardianship Estate Only & Special Cases	31	31	32	36	34	37	38	39	36				35	
Deceased/Terminated Guardianship Cases in Month		11	9	9	7	15	7	8	13	12				10	91
<b>Total Processed Representative Payee Cases</b>		<b>85</b>	<b>85</b>	<b>86</b>	<b>90</b>	<b>90</b>	<b>92</b>	<b>85</b>	<b>86</b>	<b>81</b>					<b>84</b>
Representative Payee Wait List		12	9	11	11	15	18	13	21	21					19
# of Representative Payee Visits/Contact		32	33	38	43	29	46	34	32	36				36	323
<b>Monthly Contacts</b>															
3	Actual Guardianship Monthly Contacts	667	668	672	667	666	672	682	682	686				674	6,062
	Expected Guardianship Monthly Contacts	660	658	659	656	654	664	672	672	680				664	5,975
% of Monthly Contacts Made		101.06%	101.52%	101.97%	101.68%	101.83%	101.20%	101.49%	101.49%	100.88%					
Special, Estate & Person Only Monthly Contacts		11	6	9	10	7	10	12	7	11				9	83
<b>Legal Activity</b>															
6	Total Accountings Processed	70	19	27	49	47	58	17	122	30				49	439
	# of Court Appearances by PG on behalf of PP	62	50	67	40	58	62	65	55	66				58	525
<b>Asset Management</b>															
4	Cases with Assets Over \$10,000	182	179	181	187	185	187	186	188	183				184	
	Cash Assets Managed for PP by Office (Internal)	\$10,733,188	\$10,618,513	\$11,907,609	\$11,667,646	\$11,857,519	\$11,320,360	\$11,136,181	\$11,165,619	\$10,986,462				\$11,265,900	
Value of Assets Invested on behalf of PP (External)		\$8,934,370	\$9,179,024	\$9,256,494	\$9,139,633	\$9,523,004	\$10,167,385	\$10,282,703	\$11,493,350	\$10,823,086				\$9,866,561	
PG Total Billable Hours Worked		1,846	1,647	1,652	1,653	1,721	1,655	1,957	1,867	1,767				1,752	15,765
PG Total Billable Hours Charged		\$181,304	\$169,591	\$168,356	\$167,709	\$172,834	\$168,882	\$191,356	\$183,812	\$172,089				\$175,104	1,575,932
<b>PG Fees Contributed to the General Fund</b>			\$158,417		\$98,239		\$147,400		\$111,812						\$515,868
# of Invoices Processed on behalf of PP		1979	1988	2140	2190	2444	1897	2322	2538	1798				1,862	16,758
Total Value of Invoices Processed		\$1,714,414	\$1,614,750	\$1,357,552	\$1,625,388	\$1,744,545	\$1,839,051	\$1,661,597	\$2,631,038	\$1,357,432				\$1,434,970	\$12,914,728
<b>Customer Service Activity</b>															
5	# of Telephone Calls Presented	3,096	2,883	2,731	3,165	2,975	2,726	2,038	3,291	2,895				2,867	25,800
	% of Call Response Time	92.39%	93.63%	93.59%	92.99%	91.79%	91.51%	95.37%	94.43%	93.42%					

1. These numbers will fluctuate month to month as appointments are not made on all cases at the first hearing or within the month received.
2. Ongoing person & estate guardianship vs. special/estate only/person only:  
Person & Estate - The individual requires assistance with medical decisions and financial decisions; contact is made monthly with the pp.  
Special - Limited time or limited purpose such as applying for benefits; Estate only - Financial decisions only; Person only - Medical decisions only; contact may be monthly or quarterly with the pp.
3. Percentage may be over 100% if a visit was made in the month a pp dies.
4. Fluctuations in assets are due to new cases and case closures.
5. To attain a 100% response rating, staff must answer 70% of the calls within 5 seconds. (We are training new employees on the front desk, therefore the response time is slower)
6. Variances include Annual and Summary Accountings.
7. If we are appointed at the end of the month, we do have time to visit the client.
- Please note: PP within this spreadsheet references protected person.