

New Category of Law for LTF Case Data Reporting

Advance Planning/Wills/ Estates	Wills and estates, probate administration, powers of attorney for property, powers of attorney for health, living wills, transfer on death instruments, and other advance directives.
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Explanatory note: A significant number of grantees currently report cases related to wills, estates, and advance directives in the Other category of law. The new Advance Planning/Wills/Estates category is intended to facilitate more accurate reporting and tracking of these case types, all of which relate to “end-of-life” planning and administration. By capturing these cases in a new category, it will make grantees’ work in these areas of law more visible, while also creating more space to understand the other case types reported in the Other category.

Thematically, this new category is designed for reporting case types related to a person’s permanent incapacity or end of life, including advance directives related to health and property, estate planning (including but not limited to wills and transfer on death instruments), and estate administration (including but not limited probate litigation, joint tenancy affidavits, and small estate affidavits).

Based on this thematic definition, the following case types should **not** be reported in this new category:

- Guardianship of minor children: These cases should be reported in the Family category of law.
- Guardianship of adults, Declaration for Mental Health Treatment: These cases should be reported in the Individual Rights category of law.
- Temporary short-term guardianships and advance directives providing for the care of minor children: Documents providing for the temporary care of minors whose parents face incarceration, immigration detention, or other risks to their ability to provide care should be reported in the Family category of law.
- Temporary powers of attorney: Advance directives prepared for purposes outside of end-of-life planning should be reported in the Other category. This includes but is not limited to powers of attorney designed to delegate authority to act to another person for the purpose of completing a transaction, accessing medical records, or other matters. Generally, these cases should be reported in the Other category of law.

Effective date: LTF will implement this new category of law in its annual data collection due in September 2026, for the July 1, 2025 – June 30, 2026, case reporting period. For this data reporting period, applicants should report the relevant cases in the new category when possible. For the subsequent case reporting period (July 1, 2026 – June 30, 2027) grantees should take steps to report all relevant cases in the new category.