

ADULT GUARDIANSHIP/CONSERVATORSHIP CASE CHECKLIST
Adjudicated Case – Report Review Status
(Post Adjudication)

ITMO (Protected Party): _____

Case Number: _____ Judge: _____

Person Conducting Checklist: _____ Date of Review: _____

Please do not edit or delete any sections. Court Manager must sign and date.

This case file review must be performed within 5 days of the filing of an *Order Appointing a Full or Limited Guardian/Conservator*. When the checklist is completed and verified by the Court Manager, docket and scan this form using event code **9555: CRT: Adult Guardian/Conservator Case Checklist**. This document is not part of the official court record.

	CASE REVIEW DATA ELEMENTS	Document Not Filed/ Missing
1	INFORMATION SHEET – Form 4-992 <input type="checkbox"/> Docketed using Event Code 8981 <input type="checkbox"/> All parties listed on Information Sheet entered, along with identifiers <input type="checkbox"/> Confirm all participants “entitled to notice” entered correctly	
2	NOTICE OF HEARING/RIGHTS – Form 4-999 <input type="checkbox"/> Docketed using Event Code 6495	
2a	RETURN OF SERVICE <input type="checkbox"/> Proof the Alleged Incapacitated Person <i>personally</i> served	
3	COURT APPOINTED PROFESSIONALS The following were entered on the Parties tab: <input type="checkbox"/> Qualified Health Care Professional <input type="checkbox"/> Visitor <input type="checkbox"/> Guardian Ad Litem	
3a	SEALED PROFESSIONAL REPORTS The following reports were docketed with the following codes: <input type="checkbox"/> Qualified Health Care Professional Event Code 9222 <input type="checkbox"/> Visitor Event Code 9225 <input type="checkbox"/> Guardian Ad Litem Event Code 9226	
4	ORDER APPOINTING GUARDIAN/CONSERVATOR Order docketed and scanned as follows: <input type="checkbox"/> 8388 NCJ: Order Appointing Full (Plenary) Guardian <input type="checkbox"/> 8390 NCJ: Order Appointing Limited Guardian <input type="checkbox"/> 8389 NCJ: Order Appointing Full (Plenary) Conservator <input type="checkbox"/> 8391 NCJ: Order Appointing Limited Conservator	
5	ORDER IDENTIFYING PERSONS ENTITLED TO NOTICE AND ACCESS TO COURT RECORDS - Form 4-993 <input type="checkbox"/> Docketed and scanned using Event Code 8385	
5a	REMOVAL OF PARTIES/PARTICIPANTS <input type="checkbox"/> Confirm parties/participants who are not included in the <i>Order Identifying Persons Entitled to Notice</i> have been removed	
6	NOTICE OF FIREARM RESTRICTION - Form 4-940 <input type="checkbox"/> Filed, docketed and scanned using Event Code 6601 <input type="checkbox"/> N/A	
7	BOND (Only required for Conservators) Did Court order the Conservator secure a bond? <input type="checkbox"/> No <input type="checkbox"/> Yes	
7a	ORDER TO SECURE OR WAIVE BOND - Form 4-994 <input type="checkbox"/> Docketed using Event Code 8395 <input type="checkbox"/> N/A <input type="checkbox"/> DUE: Event created using Event Code 8083 <input type="checkbox"/> N/A	

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	CASE REVIEW DATA ELEMENTS	Document Not Filed/ Missing
8	DISPOSITION <input type="checkbox"/> GCG disposition type used	
9	GUARDIAN/CONSERVATOR CONNECTION <input type="checkbox"/> Added to the party record for the person/entity appointed Guardian <input type="checkbox"/> N/A <input type="checkbox"/> Added to the party record for the person/entity appointed Conservator <input type="checkbox"/> N/A	
10	DUE: Codes <input type="checkbox"/> 8084 DUE: Conservator's Inventory (90 Day) <input type="checkbox"/> N/A <input type="checkbox"/> 8085 DUE: Guardian's Report (90 Day) <input type="checkbox"/> N/A <input type="checkbox"/> 8086 DUE: Guardian's Annual Report <input type="checkbox"/> N/A <input type="checkbox"/> 8087 DUE: Conservator's Annual Report <input type="checkbox"/> N/A <input type="checkbox"/> 8088 DUE: 10 Year Review	
11	Case Status <input type="checkbox"/> Confirm case is in "Adjudicated Case – Report Review" status	

Were any documents identified as "Not Filed/Missing"? No Yes

If yes, a copy of the checklist shall be forwarded to the Assigned Judge for further action.

TO BE COMPLETED BY THE COURT MANAGER:

I, _____, verify that I have reviewed this adult guardianship/conservatorship case checklist for accuracy.

A copy of this checklist is being forward to the assigned judge for further action: YES NO

Court Manager: _____ Date: _____

TO BE COMPLETED BY ASSIGNED JUDGE'S STAFF:

I, _____, have received the adult guardianship/conservatorship case checklist.

Signature: _____ Date: _____