



Guardianship Services Referral Checklist

Name of Referred Ward

New Referral

The referral packet includes:

- Form 5013, Contractor's Referral Form;
a copy of the Certificate of Medical Evaluation (CME); or
a copy of the Determination of Intellectual Disability;
a copy of the Assessment; and
a copy of current financial statements, such as checking, savings, certificate of deposit and money market accounts, as applicable and available.

Comments:

Referral For Successor Guardianship

The referral for successor guardianship packet includes:

- Form 5013, Contractor's Referral Form;
ward's face sheet;
a copy of the original application of guardianship (for historical information), if available;
a copy of the Letters of Guardianship;
a copy of the oath;
a copy of the original orders, if available;
a copy of the Annual Report of the Person;
a copy of the Annual Accounting;
a copy of the court-approved Monthly Allowance;
a copy of the current Individual Service Plan; and
a copy of current financial statements, such as checking, savings, certificate of deposit and money market accounts, as applicable and available.
Inventory/Order Approving the Inventory;
Final Report, as applicable;
Final Accounting, as applicable.

Comments:

Signature of the Guardian Supervisor

Date

This Section to be Completed by the Contractor

1. The referral packet was received incomplete on and returned to the Guardianship Supervisor on for the following information:

[Blank lines for providing information]

2. The completed referral packet for the above named potential ward was accepted on as representative agent of

[Blank lines for providing agent information]